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A Comprehensive Study of  
**U.S. Hispanics —  
A Market Profile**  
1980



A Comprehensive Study of

# **U.S. Hispanics — A Market Profile 1980**



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COMPLETE EDITION

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# **SPONSOR**

## **NATIONAL ASSOCIATION OF SPANISH BROADCASTERS**

The NASB was founded in July, 1979, and as one of its first acts, recognized the need for comprehensive, reliable market information with regard to the growing U.S. Hispanic Market. After careful study, the NASB realized that there was no single comprehensive, current, and reliable information on this national market.

The NASB then embarked upon an ambitious and historic goal — to have such a study created. The Board of Directors and management of the Association, including Maria Elena Torano, the first President, Antonio Guernica, Executive Vice President, and Carmen Junco, the successor to Ms. Torano, sought to define the data needed to fill this enormous gap in the current U.S. marketing reservoir.

Certain information was needed: updated and reliable population and socio-economic data, explanations of past Immigration and Census data, historic patterns of immigration, an analysis of assimilation, consumer behavior patterns, and media availability. After defining the type of data needed, the NASB sought a Research Company capable of generating this study, reliably, accurately and objectively.

Funds to initiate the project were secured from the Department of Commerce Office of Minority Business Development Agency, and J. Walter Thompson, Advertising.

Strategy Research was selected to conduct the study.

The NASB has accomplished their ambitious goal to fill this U.S. marketing information gap, and will be recognized for its foresight, determination and contribution to the U.S. marketing community.



## ACKNOWLEDGMENTS

This study would not have been possible without the sponsorship of THE NATIONAL ASSOCIATION OF SPANISH BROADCASTERS.

From the initial inception of the study, and the initial funding provided by NASB, this First Comprehensive Study of the U.S. Hispanic market became a reality. We would particularly like to recognize the efforts of Antonio Guernica, Executive Vice President of the NASB for his support and encouragement, as well as dedicated assistance.

We wish to also express our appreciation to J. Walter Thompson for the financial support it provided towards the printing of *U.S. Hispanics - A Market Profile*. Thanks are particularly extended to Mr. Antonio Ruiz of J. Walter Thompson; he believed in this project from the beginning.

We wish to thank the Office of Minority Business Enterprise, U.S. Department of Commerce.

## **U.S. Hispanics—A Market Profile**

Section II (Demographic Profile) of this book, *U.S. Hispanics—A Market Profile*, was accomplished with financial assistance from the Office of Minority Business Enterprise, U.S. Department of Commerce. The statements, findings, conclusions, recommendations and other data found in Section II (Demographic Profile) are solely those of the author and do not necessarily reflect the views of the U.S. Department of Commerce.

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## **Purpose Scope, and Methodology**

### **Purpose and Scope of the Study**

The purpose of this study is to bring together, for the first time, a comprehensive and reliable study of the entire U.S. Hispanic Market.

In the past, controversy has existed as to the size, growth rate, and concentration of this market, largely due to the fact the Immigration data and Census data has been out of date, or excludes certain persons, by definition.

The scope of this study is the United States and the Commonwealth of Puerto Rico.

This study seeks to present not only current population estimates and socio-economic data on this market, but also to show how and why the market has grown, and why certain measures of this market have in the past provided conflicting statistics.

### **Methodology**

The primary method of data collection used for this study consisted of personal interview surveys conducted by SRC. These surveys, conducted over the past several years have been analyzed to provide the basis for population and socio-economic characteristic estimates and forecasts, along with a significant amount of other data published by various reliable sources, including the Bureau of the Census, the Department of Immigration, and Market Statistics, Inc.

The bibliography of this study cites many references of such studies used to create this study.

All population projections and estimates were done by SRC in 1980.

### **A few methodological notes:**

For purposes of this report, "Hispanic" is defined as those persons of Spanish origin or heritage who speak Spanish. Thus, persons of Spanish surname or origin who do not speak Spanish are, for the most part, not included. Since a variety of sources were utilized, there may have been some departure from this definition in a few cases. However, Strategy Research Corporation attempted to compensate for these exceptions in their projections and population estimates.

For comparison purposes, a number of sections of this report contain 1970 Census population figures. The reader should be aware that the definition of these 1970 Spanish population figures may not always be consistent. In some cases they may be based on surname; in other cases they may represent self-classifications; and in still other cases they may be based on language spoken. Again, this applies to the 1970 Spanish population data; not the new estimates.

No comprehensive or systematic attempt has been made to include the large number of Hispanic undocumented or illegal aliens in the population estimates of this report. However, in some cases the population estimates may or may not include a portion of this undocumented segment.

Although their dictionary meanings may differ, the terms "Hispanic," "Latin" and "Spanish" are used interchangeably throughout the text.

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## PREFACE

The Hispanic population of the United States today represents a market that is 15 million people strong, 18.5 million including Puerto Rico. The Hispanic market is also the fastest growing in the country, having increased at a rate 6½ times that of the general population in the last ten years.

Immigration to the United States from Spanish speaking countries shows no sign of slackening, nor is immigration expected to decline appreciably until such time as these Latin countries, particularly Mexico, reach relative parity with the United States. Regional data indicates that Hispanic mothers are giving birth to children at a higher rate than the general population. Giving birth to children whose first words will be in Spanish, whose attitudes and perceptions will be initially shaped within the Spanish speaking environment of their homes.

Hispanic families are larger and younger than non-Spanish families. The Hispanic population is largely urban and geographically concentrated, therefore easy to reach through the appropriate media. Hispanics have demonstrated their capacity for upward mobility and the income level of the Hispanic population is rapidly increasing.

The Hispanic market represents potential buyers, potential profits for most products.

Whether the buying habits of the Hispanic favor one product over the other depends substantially on the importance that the advertiser places on addressing the Hispanic.

The U.S. Hispanic population is the only sizeable market segment in this country that cannot be reached comprehensively through the use of English language media. The advertising message itself must be developed so as to be culturally in tune with the Hispanic. Both the language and culture of the Hispanic market dictate that the advertiser must actively pursue it in order to be successful.

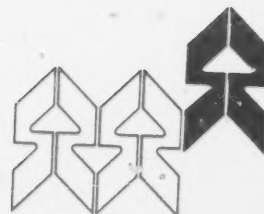
Many alert marketing companies have already recognized and successfully appealed to the Hispanic market. However, overall competition for the Hispanic consumer is currently much less severe than competition for the general consumer. This means that the potential for dramatically increasing sales by captivating the consumer's attention through advertising is higher in the Hispanic market than in the general market.

This Profile is intended to provide marketing and media decision-makers with comprehensive and useful information on the U.S. Hispanic market. Much of the Profile centers on demographic characteristics such as population estimates, geographic concentrations, age/sex distributions and income levels. However, the Profile goes beyond basic statistics, taking a historical look at Hispanic participation in this country and discussing the role of Spanish media in advertising to the Hispanic.

A presentation of demographic facts alone would not account for the cultural characteristics that make the U.S. Hispanic market unique.

We hope that the information contained within *U.S. Hispanics - A Market Profile* will broaden your knowledge and understanding of the Hispanic population in the United States and that the *Profile* will prove to be a useful and effective marketing tool.

# **I. HISTORICAL BACKGROUND**





# I. Historical Background

## A. Early Settlement

The discovery of the new world by Christopher Columbus in 1492 gave adventurers and explorers from many European countries the impetus to see for themselves what the area offered in the way of fortune and opportunity.

John Cabot, and English explorer, discovered the mainland of North America in 1497. Other explorers followed, but due to the bitter winters, thick forests and trouble with the Indians there was little interest in colonization until British settlers arrived a hundred years later.

The first permanent colony was established at Jamestown, Virginia in 1607 by the London Company. Although the band of 100 men experienced many hardships, including starvation, sickness and trouble with the Indians; they survived and established a promising community. They raised corn and hogs, as well as an improved type of tobacco — all of which found a market in Europe and provided a solid basis for their economy.

In 1620 the Pilgrims landed at Plymouth, Massachusetts and founded the Massachusetts Bay Colony. Other settlements were being formed along the Atlantic seaboard, as more and more settlers arrived.

These first settlers came to America for a variety of reasons; some for religious or political freedom, some to seek their fortunes, and others to escape economic hardship in their own countries.

## B. Colonial America

Although slavery existed in all the colonies, most large slave holders lived in the South — where the climate and the crops grown (tobacco and cotton) called for large numbers of workers with the stamina to withstand the heat and sun.

By 1760, there were a million and a half people living in the thirteen colonies. Most of these people were hard working Protestants who lived comfortably, with few who were very rich or very poor.

At this time, three of every four Americans were descendants of English and Irish settlers. Even though they were mainly English, they were beginning to think like Americans rather than British subjects.

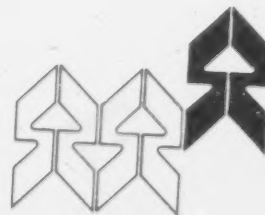
Although most of these one and a half million people were British, there were growing numbers of Scottish, Dutch, German and Swedish immigrants. They were already being described as having melted into a new race — Americans.

## C. Independence

Every colony had its own legislature and each was allowed (by the British) to handle its own affairs politically. Although Britain left the colonies alone in many aspects, they maintained control economically. It was economic controls which the independent Americans finally rebelled against, declaring their independence in 1776.

The colonists proved successful in their determination to be independent, defeating the British in the Revolutionary War. The Peace Treaty was signed in 1783.

The thirteen colonies continued their autonomous rule for the next four years until the new Constitution was ratified and adopted in 1789.



## D. Population Growth — 1800's

The first census of the new country was conducted in 1790. At that time the population stood at 3,930,000. Only about 100,000 of these people lived west of the Alleghenies. However, people soon began to stream westward. Kentucky became a state in 1792. For those people who had already taken the step of crossing the ocean to America, pulling up stakes to move westward in the hope of improving their lot even further was not difficult.

During the time that this large internal migration westward was taking place, immigration to the U.S. was minimal. In the fifty years between 1790-1840 fewer than one million new residents arrived.

Immigration statistics were not kept until the year 1820, but since that time we can see the progression of immigrants to the U.S. From fewer than a million in the 50 year period 1790-1840, there was an influx of 1.7 million in the ten years between 1840-1850. This represented 28.1% of the total population increase for that 10 year period.

Table ID-1 shows a comparison of population growth to the number of immigrants throughout the history of the U.S.

TABLE ID-1  
U.S. POPULATION & IMMIGRATION  
1790 - 1970

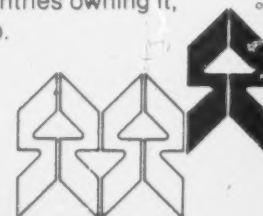
| As of: | Total<br>Population | From Last Date         |                      | Immigrants<br>As % of<br>Total<br>Increase |
|--------|---------------------|------------------------|----------------------|--------------------------------------------|
|        |                     | Population<br>Increase | No. of<br>Immigrants |                                            |
| 1790   | 3,930,000           | --                     | --                   | --                                         |
| 1820   | 9,640,000           | 5,710,000              | --                   | --                                         |
| 1840   | 17,069,450          | 9,429,450              | 744,595              | 7.9                                        |
| 1850   | 23,190,000          | 6,120,550              | 1,719,606            | 28.1                                       |
| 1900   | 75,995,000          | 52,805,000             | 16,660,625           | 31.6                                       |
| 1920   | 105,710,600         | 29,715,600             | 14,531,197           | 48.9                                       |
| 1950   | 150,697,000         | 44,986,400             | 5,670,678            | 12.6                                       |
| 1970   | 203,235,300         | 52,538,300             | 5,837,200            | 11.1                                       |

\*Records not kept until 1820.

Source: U. S. Bureau of the Census  
U.S. Immigration & Naturalization Service  
Strategy Research Corporation

In looking at this table, we can see that the ratio of immigration to population increase ranges from a low of 7.9% in the 1820-1840 period to a high of 48.9% (1900-1920). This period following the turn of the century saw a large influx of immigrants from southern and eastern Europe, tapering off in 1921 when immigration quotas were first established.

During the 19th century, American settlers continued moving farther and farther west, settling the land as they went without regard to ownership of that land. As areas became settled and as ownership disputes arose, the U.S. Government both arranged to purchase the land from the countries owning it, and went to war to obtain it — as in the dispute over the Texas territory with Mexico.



The discovery of gold in California in 1848 prompted an increasing movement of people westward. By the middle of the century, the continental U.S. boundaries were basically complete.

From the birth of the country through the 1880's, immigration was mainly from northern and western Europe. Three of every four immigrants continued to be from England, Ireland and Germany.

TABLE ID-2  
PERCENT IMMIGRATION BY AREA  
1820 - 1900

| Country        | % of<br>Total<br>Immigration |
|----------------|------------------------------|
| Germany        | 26.2                         |
| Ireland        | 20.2                         |
| Great Britain  | 15.9                         |
| Scandinavia    | 7.5                          |
| Italy          | 5.4                          |
| USSR & Baltic  | 3.8                          |
| Rest of Europe | 10.6                         |
| Total Europe   | 89.6                         |
| Canada         | 5.5                          |
| Rest of World  | 4.9                          |
| TOTAL          | 100.0                        |

Source: U.S. Immigration & Naturalization Service  
Strategy Research Corporation

As the 19th century came to a close, the immigration pattern began shifting. More and more immigrants were arriving from southern and eastern European countries, such as Italy, Austria and Hungary.

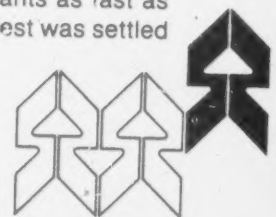
Table ID-2 shows the percent distribution by country of immigration in the 80 years of the 19th century for which immigration statistics were recorded.

Germany, Ireland and England comprise over 60% of the total and all of Europe encompasses 90% of the total immigration. As well, one may consider including Canada with the European total; since it was similarly a developing nation whose settlers also came from Europe, with some passing through to the U.S.

### E. Immigration 1900 - 1920

The first 20 years of the 20th century had the largest influx of immigrants of any period in history. Fourteen and a half million arrived, with 70% coming from the southern and eastern European countries.

In this 20 year period, immigration accounted for nearly half (48.9%) of the total increase in population. Until the end of World War I, American industry welcomed and employed the immigrants as fast as they arrived. However, by 1920, industry had developed, the railroads were built, the West was settled and unskilled labor was no longer in demand.



Lack of jobs was not the only problem. The shift to a different ethnic background of the immigrant groups created problems of assimilation with those already settled, the basically White Anglo-Saxon population.

In 1921 an immigration quota system was established, aimed specifically at limiting the number of eastern Europeans who could immigrate.

Thus, 1920 ended the open immigration era of the U.S. Never again would immigrants stream to our shores in unrestricted numbers.

## **F. Early Spanish Heritage**

While our history books stress the development of the United States as described, an important element of this development is often overlooked.

Over half of the first explorers to the New World were Spanish and they did an extensive job of discovering, exploring and settling the Caribbean, Central and South America.

They were seeking gold, but were also crusaders spreading the word of God. They were far-ranging explorers, traveling as far north as Virginia — where they felt conditions were adverse for settlement — and across the continent to California.

## **G. Caribbean Settlement**

As these explorers began visiting the New World islands of the Caribbean, they systematically settled them and established colonial governments, ruling over the inhabitants.

Santo Domingo was founded in 1496 and became the administrative center for early development. All ships sailed to and from Santo Domingo and other colonies were supplied from there.

Principally, the islands were developed as stepping stones for Spanish expeditions and as protection for shipping lanes. They also became agricultural centers for a variety of products.

Havana was founded in 1515 and became the cultural center for the Spanish New World. With its natural harbor and proximity to the Florida Straits and shipping lanes, it became the new point of departure and arrival for ships from Mexico and Peru.

Puerto Rico was also settled early (1508, by Ponce de Leon). Its main importance was as a military outpost of the Spanish Empire and its economy was strictly agrarian.

While Spanish settled the islands, their main interest centered on the mainland, where gold and silver could be found.

## **H. Mexico**

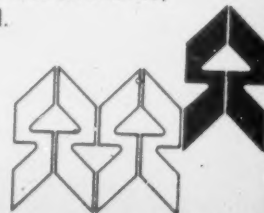
In 1519, Cortez sailed from the West Indies to Mexico, where he defeated the Aztecs.

Once Spain learned of the riches to be found in Mexico, thousands of Spaniards came to the New World for wealth and a desire to spread Christianity.

Spanish conquistadores and priests set out from Mexico and visited Florida. St. Augustine was founded in 1565, more than 40 years before the first British settlement at Jamestown.

The Spanish also crossed to the Southwest and California seeking gold. Not finding the legendary cities of gold, the explorers turned south to more promising areas in Central and South America.

As in the islands, exploration of these areas was followed by permanent colonization. Governments, churches and universities — some of which are still in existence — were established.





## **I. Settlement of the Southwest**

In 1598, Don Juan de Onate, leader of a Spanish expedition, formally claimed all land north of the Rio Grande for Spain. In the first thirty years of the 17th century, 25 settlements and missions were founded in the Southwest. The city of Santa Fe, the capital, was founded in 1609, approximately the same time as the British founded their first colony at Jamestown.

In settling and developing the Southwest, the Spanish combined their knowledge of irrigation techniques with those of the Pueblo Indians to provide arable land for growing crops.

Spain did not spread its settlements into other areas such as Texas, California and Arizona until the end of the 17th century, when they began to worry about other European powers usurping the land.

Although missions were established in Arizona and Texas, the Indians kept them under constant attack, and these outposts remained isolated and undeveloped.

In 1769, Spain turned to California and established a chain of 21 missions along the coast. At the time these missions were being established, the American colonies were declaring their independence from England.

By 1800, the Spanish had missions and settlements in California, Arizona and Texas; a strong development in New Mexico and St. Augustine, Florida, and smaller additional settlements in Florida. From this point of greatest expansion, the Spanish empire in the Americas began to shrink.

## **J. Decline of Spanish Empire**

In 1800, Spain signed a secret treaty with France to exchange the Louisiana Territory for land elsewhere. The U.S., in 1803, bought the territory from Napoleon for \$15 million. This territory covered 828,000 square miles, from Louisiana to the Canadian border, including what are now the states of Louisiana, Arkansas, Iowa, Nebraska, Oklahoma, Kansas, North and South Dakota, Wisconsin, Minnesota and part of Montana.

Spain's isolated eastern outpost on the mainland — Florida — was being settled by Americans, who complained about the lack of protection from the Indians. President Monroe sent troops into Florida to protect the settlers. Spain, realizing that the U.S. intended to acquire Florida by any means, agreed to sell it for \$5 million. This transfer took place in 1819.

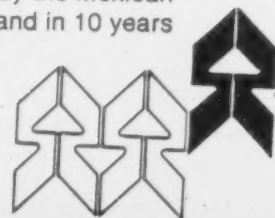
In the first years of the 19th century, Mexico began its drive for independence from Spain and in 1821 granted independence to Mexico. Mexico's boundaries at that time extended from Honduras and Panama on the south to California, Texas, Arizona, New Mexico, Nevada, Utah and part of Colorado on the north.

As the pioneers pushed westward across the Mississippi River, they encountered Spanish-speaking people for the first time. At first the Spanish were unconcerned because the pioneers were few in number and were explorers and trappers, not permanent settlers.

In 1822 the Santa Fe Trail opened to carry supplies between Independence, Missouri and Santa Fe and a great deal of trade developed. At the same time, clipper ships from New England began landing in California to trade with the settlements there. However, as late as 1840 there were only 400 Americans living in California, outnumbered by the Spanish 10 to 1.

## **K. Texas Independence**

In 1800 the area now known as Texas — which was part of Mexico — had a population of 5000 Hispanic Mexicans. In 1821, a St. Louis banker, Moses Austin, was given a land grant by the Mexican government to settle 300 American families in the area. Many other settlers followed and in 10 years the new settlers outnumbered Mexicans four to one.



Although the Mexicans taught the settlers a great deal about living in this land where the climate was different, the Americans did not adopt the Mexican ways or customs and did not want to be ruled by a "foreign" government; even though the Americans were on Mexican soil.

In an attempt to maintain control over the area, Mexico placed restrictions on immigration and assumed dictatorial powers over the area.

The American colonists rebelled and proclaimed Texas to be independent in 1836. Mexico refused to recognize their independence and when Texas was voted into the U.S. as a state in 1845, Mexico accused the U.S. of planning the whole rebellion. In fact, the U.S. had concurrently been attempting to purchase Texas, California and New Mexico, but Mexico had refused to sell.

## **L. Mexican War**

The U.S. had come to believe in a "Manifest Destiny" — that the U.S. was destined to stretch from the Atlantic to the Pacific — and if land could not be bought, it could be acquired by other means. In 1846, President Taylor ordered troops to a disputed border area and after a clash with Mexican troops, war was declared. The U.S. attacked the Mexicans as far west as California and invaded Mexico as far south as Mexico City.

Mexico was overwhelmed and quickly defeated. The Treaty of Guadalupe Hidalgo in 1848 awarded to the U.S. all the Mexican territory north of the Rio Grande: Texas, Arizona, New Mexico, California and parts of Colorado, Utah and Nevada. In exchange for this vast territory, Mexico was paid \$15 million.

Thus, with the stroke of a pen, the U.S. gained a vast Spanish heritage and although the Spanish population was not great in numbers at the time, the culture, religion, traditions and language were so instilled in these areas that no amount of non-Spanish settlement could erase them.

Because the Spanish people in these areas were already settled when the territories were acquired, their numbers do not appear in any immigration records. Thus it appears from the records that the U.S. had no major Spanish influx until the 20th century.

Ironically, a few days before the signing of the Treaty in 1848, gold was discovered at Sutter's Mill, California. The realization of the dream which drove the Spaniards to explore and settle the area came too late for their descendants in Mexico.

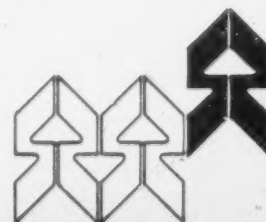
One last purchase between the U.S. and Mexico in 1853 (the Gadsden Purchase) aligned the border and gave the U.S. an additional 75,000 Mexicans as citizens.

These Mexicans, who became part of the U.S. as a result of the Treaty and Purchase might well have felt bitterness at a fate which left them an unwelcome minority in what had been their own land. The basically middle-class Americans who moved into these Spanish lands were envious of the aristocracy and contemptuous of the lower classes.

The swift overpowering of Mexico in the war created feelings of superiority among the Americans. Strong feelings of being a white Protestant country precluded acceptance of Mexican American Catholics on an equal basis.

The Spanish natives had difficulty in protecting their rights and interests in the English speaking courts. With sometimes sketchy proof of ownership, proving that ancient land grants actually existed was no easy task.

The massive influx of settlers to California with the discovery of gold compounded the problem. First, there was no opportunity for a gradual assimilation of the new settlers into the established Spanish way of life and second, the demands of land grants precipitated a takeover of Spanish lands.





Ultimately, the majority of Mexican Americans ended up as subsistence farmers on small plots of land or as laborers for American farms or industries.

There were some areas, notably New Mexico with its bilingual constitution, which were exceptions to the unilateral takeover by the westward-pushing pioneers.

## **M. Migration and Immigration**

### **1850 - 1900**

The second half of the 19th century was the time of major westward expansion now that the borders were settled from the Atlantic to the Pacific. More and more settlers moved into the western lands and further outnumbered the Mexican Americans in the area.

At the same time immigrants were beginning to pour into the U.S. from Ireland. Coming to escape the potato famine in the eight years between 1846 and 1854, 1.2 million Irish arrived in the U.S. In the years 1852-1854, a half million Germans also arrived.

Not until the end of the century was there again such a concentrated influx of immigrants; and by then, with the industrial revolution beginning and with the railroads being built, there was an enormous need for labor in this country.

During this 50 year period (1850-1900) there was virtually no in-migration of Spanish residents and, in fact, this period is a blank page for Spanish-Americans, as the settlers took over and superceded nearly all Spanish developments.

In this period, the population of the country tripled, from 23 million in 1850 to nearly 76 million in 1900. Of this increase, 16.6 million were immigrants, or nearly 32% of the total population increase.

## **N. Last Bastions of the Spanish New World Empire**

Over the years since the awarding of independence to Mexico in 1821, nearly all the remaining countries in the New World were granted independence by Spain. The two notable exceptions were Cuba and Puerto Rico, whose demands for independence had not been met.

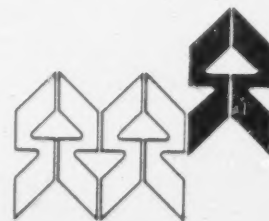
The U.S. had substantial economic interests in Cuba in the late 1800's and there was much interest in an independent Cuba. Spain was willing to make concessions which equated to Cuban independence, but before negotiations could begin, the U.S. Battleship Maine blew up in Havana Harbor and the U.S. declared war on Spain on April 21, 1898. The U.S. occupied Puerto Rico during the war as it was the only other Spanish possession remaining in this hemisphere.

In four months the war was over, and Spain agreed to cede Puerto Rico, the Philippines and Guam to the U.S., and grant independence to Cuba.

Although Cuba was independent, the Platt Amendment gave the U.S. veto power over Cuba's diplomatic and fiscal relations with other countries. Further, the amendment recognized the right of the U.S. to intervene to protect Cuba's independence, and committed Cuba to giving the U.S. a Naval Base on the island.

Puerto Rico, which had been struggling for independence from Spain, found itself a possession of another country and one very different from itself. Its mixed culture of Hispanic, Indian and African elements were confronted with the same Anglo Saxon Protestant Americans who had overwhelmed the Mexicans. For Puerto Ricans, the 20th century began with a great deal of uncertainty regarding the future.

The beginning of the 20th century found the U.S. stretching across a whole continent — growing up, developing and flexing its muscles as a coming world power.



## O. 1900 - 1920

The composition of the immigrants arriving on our shores shifted dramatically at the turn of the century — from the British Isles and Germany to southeastern Europe and other areas.

In the first decade of the 20th century over 2 million Italians alone immigrated to the United States.

At this same time Mexican laborers by the thousands began coming into the United States to harvest crops, help complete the railroads and find employment. Eventually they found themselves employed in industry across the land — from meat plants in Chicago to steel mills in Pittsburgh and auto plants in Detroit.

Many of these laborers left their families behind and sent money home or returned to Mexico as they were able. Because of the demand for labor at this time, the Mexicans simply crossed over the border and any immigration laws were ignored.

In 1917, the U.S. granted citizenship to Puerto Ricans. This began a large immigration which has never ceased. The Puerto Ricans, like the Mexicans, first came to earn money to send home, eventually returning home themselves if possible. Because the Puerto Ricans are citizens, their numbers are not recorded in immigration statistics, and there is a constant free flow migration to and from the Island.

The estimated native born Puerto Rican population in the U.S. was only 1,500 in 1910 and jumped to nearly 12,000 in 1920, as Table IO shows.

TABLE IO  
ESTIMATES OF NATIVE BORN  
PUERTO RICAN POPULATION IN THE U.S.  
1910 - 1960

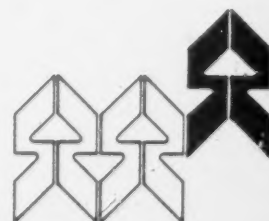
| As of: | Estimated<br>Number |
|--------|---------------------|
| 1910   | 1,513               |
| 1920   | 11,811              |
| 1930   | 52,774              |
| 1940   | 69,967              |
| 1950   | 301,000             |
| 1960   | 617,056             |
| 1970   | 850,000             |

Source: Strategy Research Corporation

## P. Immigration Regulations

Prior to 1921 there were very few restrictions on immigration to the U.S. Certain people, such as convicts, indigents, etc. were excluded and there were limitations on Asiatics; but in large measure anyone who could afford the passage was allowed into the country. In 1907, 1,285,349 immigrants arrived in the U.S. — the record for any one year.

As industry began needing fewer unskilled laborers and as the numbers of non-northern Europeans grew in quantum jumps, restrictions were seen to be necessary.



The Immigration Act of 1921 placed a numerical ceiling of 357,000 immigrants per year for countries outside the Western Hemisphere. Each country was allowed 3% of the number of persons of that nationality living in the U.S. in 1910. In 1924, the quota was changed to 2%, and the base year was lowered to 1890.

In 1929, the National Origins Law went into effect. This set a limit of 150,000 immigrants per year and stressed the country of birth rather than country where a person lived and applied for a visa. It also excluded Asian countries. The purpose of these changes was to prevent any large change in the basic makeup of the U.S. population.

These laws, along with the Depression, drastically reduced the number of immigrants in the 1930's.

## **Q. Growth of Hispanic Population 1900 - 1950**

By 1930, the Hispanic population in the U.S. was over 2 million; half of them immigrants in the last generation, the other half descendants of the early settlers who became U.S. citizens when Mexico ceded the Southwest to the U.S. in 1848.

Most of the immigrants who arrived were poor laborers who were seeking to escape poverty in Mexico. Unfortunately, as the Depression swept the U.S. in the 1930's, these immigrants were the first to be out of work. Many communities found that it was cheaper to pay the expense of sending the Mexicans home than to pay them welfare. A great many Mexicans returned to Mexico during this time, and in 1936 less than 10% of the seasonal labor available in 1930 was still available.

Whereas the year 1907 saw 1.2 million people immigrate to the U.S., in the 10 year period from 1931-1940, an average of only 53,000 immigrants per year came to this country. The more restrictive immigration laws and the world-wide depression combined to virtually stop immigration. Not since the 1820's had so few people immigrated to this country. The war years, 1941-1945 were equally low in numbers.

The onset of World War II revived a huge need for labor in the U.S. At that time the U.S. and Mexico established the Braceros Program, which sent thousands of Mexican laborers to the U.S. to work in factories and fields. In a two year period over 56,000 Braceros (laborers) came to the U.S. to work. Even that number didn't fill all the jobs available, so many Mexicans came into the country illegally.

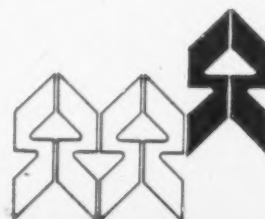
This new influx of Spanish speaking people settled in large part in urban areas, where they developed their own neighborhoods — or barrios — and where they maintained their own culture and language.

Thousands of Mexican Americans served in the War, as did many Puerto Ricans who joined the U.S. Armed Forces. Many of the returning soldiers took advantage of the GI Bill of Rights to further their schooling and became trained in professional areas. These people became leaders in the Hispanic communities, active in government and business.

## **R. Puerto Rican Migration**

During the war, the migration from Puerto Rico was minimal. Beginning in 1946, immigration increased dramatically. The advent of regular airline service between New York and San Juan significantly shortened the trip and many returning soldiers had become steeped in American ways and were anxious to try the American way of life.

While Mexicans entering the country settled in the Southwest and California, a large number of Puerto



Ricans went to New York City. For one, the established travel routes were basically between San Juan and New York. Also, New York City possessed already established Puerto Rican barrios where family and friends lived. Although the South and Southwest might have seemed more logical areas for Puerto Rican migration, in the South they would have had to compete with the Blacks for jobs and in the Southwest with the Mexican Bracerós.

Surprisingly, the second largest Puerto Rican population center in the U.S. prior to 1950 was San Francisco. Some of the earliest migration of Puerto Ricans was to Hawaii — to work in the sugar cane fields — with San Francisco as the debarkation point.

Overcrowding on the island of Puerto Rico was a major factor in the immigration patterns to the U.S. The labor supply available greatly exceeded the number of jobs on the island.

## S. Immigration Patterns 1820 - 1950

There was a dramatic shift in countries of origin of immigrants between 1820-1900 and the period 1900-1950. The number of immigrants from northwestern Europe dropped sharply while the numbers from countries of southern and western Europe rose.

The percentage of German-origin immigrants decreased from a high of 26.2% of total immigrants in the 1820-1900 period, to 6.1% of the total in the 1901-1950 period. The ratio of Irish immigrants dropped from 20.1% to 3.7% of the total.

On the other hand, Italians rose from 5.4% to 18.5% and Russians increased from 3.8% to 13% of total immigrants.

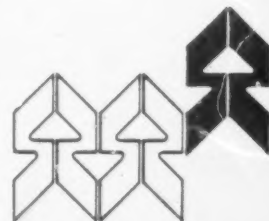
Latin Americans jumped from less than 1% to 7% of total immigrants between these two periods.

Table IS shows the comparison between the two periods of immigration, as well as the percent change by major country or area.

**TABLE IS**  
**U.S. IMMIGRATION**  
**PERCENT BY COUNTRY**  
**1820-1900 Versus 1901-1950**

|                     | 1820 -<br>1900 | 1901 -<br>1950 | Percentage<br>Point<br>Change |
|---------------------|----------------|----------------|-------------------------------|
| Germany             | 26.2%          | 6.1%           | -20.1                         |
| Ireland             | 20.2           | 3.7            | -16.5                         |
| Great Britain       | 15.9           | 6.7            | -9.2                          |
| Scandinavia         | 7.5            | 4.7            | -2.8                          |
| Canada              | 5.5            | 10.5           | +5.0                          |
| Italy               | 5.4            | 18.5           | +13.1                         |
| USSR                | 3.8            | 13.0           | +9.2                          |
| Asia                | 2.7            | 2.9            | +0.2                          |
| Latin America       | 0.9            | 7.0            | +6.1                          |
| Australia           | 0.1            | 0.2            | +0.1                          |
| Africa              | 0.0            | 0.1            | +0.1                          |
| Balance of Europe   | 10.6           | 5.7            | -4.9                          |
| All Other Countries | 1.2            | 0.2            | -1.0                          |
| Total               | 100.0%         | 100.0%         |                               |

Source: Strategy Research Corporation





While the 1900-1920 ratio of immigrants to total increase in population was 48.9%, the 1920-1950 ratio dropped to 12.6%. The actual number of immigrants dropped from 14.5 million in the 20 years 1900-1920, to 5.7 million in the 30 years 1920-1950.

Over the years, many different groups of people came to the U.S. for many different reasons. Immigration statistics show the rise and fall of total immigrants from different countries, reflecting events taking place in those countries. The Irish famine brought large numbers of Irish immigrants in the early 1850's; the USSR doubled and tripled its number of immigrants in the early 1900's as a result of the Russian Revolution. Before and after both World Wars, Germans came in large numbers, while, obviously, during the Wars very few were admitted. The large number of German immigrants prior to World War II reflect the many Jews who were escaping the Nazi persecution. In fact, beginning with the first colonial settlements, the reasons for leaving a homeland were often to escape political or religious persecution.

As outlined earlier, however, the flow of Hispanics of this hemisphere to the United States was (and is), to a large extent, for economic reasons — to improve their opportunities for employment. Puerto Ricans, in particular, have an advantage in that, as American citizens, should they desire to return home, they may do so at any time. This possibility was not available to earlier immigrants who had to cross an ocean to get here and very seldom had the opportunity to return home. They did not have the advantage of low cost, fast air travel; or the means and time available to make a return visit. These early immigrants were in a position of having no alternative but to adapt to this country, with only their fellow immigrants as reminders of the country they had left.

#### **T. Recent Immigration: 1951 - 1977.**

Immigration from Latin American countries has soared, while immigration from other areas of the world continues to decline.

The 1951-1977 period showed a jump in the number of persons immigrating from Latin American — from 7% of the total from 1900-1950 to nearly 36% in this current period. Even this figure is understated as nearly ½ million Puerto Ricans are not included (as U.S. citizens); nor are Cubans who retain Refugee status. Table IT-1 shows immigration by major country and area of the world for the three periods 1800-1900, 1901-1950 and 1951-1977, giving an overview of the fluctuations from area to area and the changing U.S. policy toward immigration. (See following page.)

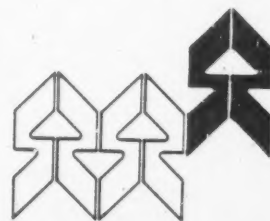




**TABLE IT-1**  
**IMMIGRATION**  
**BY MAJOR COUNTRIES & AREAS**  
**1820-1900, 1901-1950, 1951-1977**

|                                           | 1820 -<br>1900 | Percent<br>of Total | 1901 -<br>1950         | Percent<br>of Total | 1951 -<br>1977 | Percent<br>of Total |
|-------------------------------------------|----------------|---------------------|------------------------|---------------------|----------------|---------------------|
| Germany                                   | 5,010,000      | 26.2                | 1,238,300              | 6.1%                | 721,700        | 8.3                 |
| Italy                                     | 1,040,100      | 5.5                 | 3,736,400              | 18.5                | 510,500        | 5.8                 |
| Great Britain                             | 3,028,400      | 15.9                | 1,358,500              | 6.7                 | 495,100        | 5.7                 |
| Ireland                                   | 3,871,800      | 20.2                | 746,500                | 3.7                 | 103,700        | 1.2                 |
| Austria/Hungary                           |                |                     | 4,171,500 <sup>7</sup> | 20.6                | 142,500        | 1.6                 |
| USSR & Baltic <sup>1</sup>                | 723,900        | 3.8                 | 2,620,400              | 13.0                | 24,700         | 0.3                 |
| Scandinavia <sup>2</sup>                  | 1,438,200      | 7.5                 | 945,200                | 4.7                 | 107,600        | 1.2                 |
| Canada                                    | 1,051,000      | 5.5                 | 2,126,200              | 10.5                | 903,800        | 10.3                |
| Latin America <sup>3</sup><br>& Caribbean | 167,850        | 0.9                 | 1,410,950              | 7.0                 | 3,124,200      | 35.8                |
| Asia <sup>4</sup>                         | 523,750        | 2.7                 | 580,650                | 2.9                 | 1,506,600      | 17.2                |
| Australasia <sup>5</sup>                  | 17,250         | 0.1                 | 52,150                 | 0.2                 | 47,600         | 0.5                 |
| Africa                                    | 1,500          | 0.0                 | 31,200                 | 0.1                 | 88,300         | 1.0                 |
| Balance of Europe <sup>6</sup>            | 2,017,400      | 10.6                | 1,143,600              | 5.7                 | 931,000        | 10.7                |
| All Other Countries                       | 233,675        | 1.2                 | 40,325                 | 0.2                 | 31,000         | 0.4                 |
| Total                                     | 19,124,825     | 100.0               | 20,201,875             | 100.0               | 8,738,300      | 100.0               |

<sup>1</sup>Includes Latvia, Estonia, Lithuania, Finland, European USSR

<sup>2</sup>Includes Norway, Sweden, Denmark & Iceland

<sup>3</sup>Includes all Western Hemisphere with exception of Canada & Newfoundland

<sup>4</sup>Includes all Asia, including Asiatic USSR & Philippines

<sup>5</sup>Includes Australia, New Zealand, Pacific Islands

<sup>6</sup>Netherlands, Belgium, Luxembourg, Switzerland, France, Czechoslovakia, Yugoslavia, Rumania, Bulgaria, Turkey in Europe, Spain, Portugal, Greece

<sup>7</sup>Includes 1820 - 1900

Source: U. S. Immigration & Naturalization Service  
Strategy Research Corporation

Great Britain, Ireland and Germany, which dropped from the highest totals in the first period, have remained relatively stable in the entire 1900-1977 period. Countries such as Italy, Austria and U.S.S.R., which tripled in numbers of immigrants to the U.S. in the 1901-1950 period, have dropped back to their ratios of the earlier period. This reflects the Immigration quotas established in the 1920's as well as the world political situation in which persons from communist countries may not freely emigrate.

Asia has shown a recent appreciable jump in the numbers of immigrants, going from 2.9% of total in 1901-1950 to 17.2% of total in 1951-1977 period.

The largest increase in immigration from Asia came in the 1970's, with nearly one million people arriving, many of them political refugees from Vietnam.

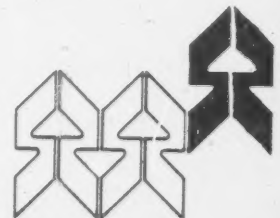


Table IT-2 shows the total immigration to the United States from 1820-1977. During this period the largest number of immigrants to the U.S. has come from Germany (14.5%). Immigrants from Italy were next in line, representing 11%. For the entire period, Latin American immigration was 9.8% of the total immigration to the United States.

**TABLE IT-2**  
**TOTAL IMMIGRATION**  
**1820-1977**  
**AREAS BY RANK AND PERCENT**

|                                    | Total<br>Number | Percent<br>of Total |
|------------------------------------|-----------------|---------------------|
| Germany                            | 6,970,000       | 14.5                |
| Italy                              | 5,287,000       | 11.0                |
| Great Britain                      | 4,882,000       | 10.1                |
| Ireland                            | 4,722,000       | 9.8                 |
| Latin America<br>& Caribbean       | 4,703,000       | 9.8                 |
| Austria/Hungary                    | 4,314,000       | 9.0                 |
| Canada                             | 4,081,000       | 8.5                 |
| USSR & Baltic States               | 3,369,000       | 7.0                 |
| Scandinavia                        | 2,491,000       | 5.2                 |
| Asia                               | 2,611,000       | 5.4                 |
| Africa                             | 121,000         | 0.3                 |
| Australasia                        | 117,000         | 0.2                 |
| Remainder of<br>European Countries | 4,092,000       | 8.5                 |
| All Other Countries                | 305,000         | 0.7                 |
| Total Immigration                  | 48,065,000      | 100.0               |

Source: Strategy Research Corporation

Table IT-3 shows immigration by 10 year periods from 1951-1977 and shows a dramatic drop in European immigrants in the 70's as well as the rise in Asian countries' immigration. (See following page.)

It is interesting to note that the 1951-1977 period has brought 75% of the total immigrants from Latin America, while European immigrants in that period equal 8% of their total and Canadian immigrants only 22% of their total. Asian immigrants, even with their large recent influx, had only 58% of their total immigration occur during the 1951-1977 period.

In looking at the immigration from the Americas it can be seen that many people are arriving from Latin American countries other than Mexico, Cuba and the West Indies.

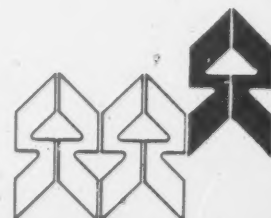


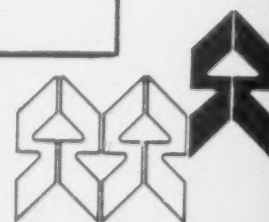
**TABLE IT-3**  
**U.S. TOTAL IMMIGRATION BY AREA**  
**OF LAST RESIDENCE**  
**1820 - 1977**

|                                            | 1820 -<br>1901    | 1901 -<br>1950         | 1951 -<br>1960   | 1961 -<br>1970   | 1971 -<br>1977   | Total             |
|--------------------------------------------|-------------------|------------------------|------------------|------------------|------------------|-------------------|
| <b>Europe</b>                              |                   |                        |                  |                  |                  |                   |
| Germany                                    | 5,010,019         | 1,238,281              | 477,800          | 190,800          | 53,100           | 6,970,000         |
| Italy                                      | 1,040,095         | 3,736,405              | 185,500          | 214,100          | 110,900          | 5,287,000         |
| Great Britain                              | 3,028,359         | 1,358,541              | 195,500          | 210,000          | 89,600           | 4,882,000         |
| Ireland                                    | 3,871,793         | 746,507                | 57,300           | 37,500           | 8,900            | 4,722,000         |
| Austria/Hungary                            |                   | 4,171,500 <sup>1</sup> | 103,700          | 26,000           | 12,800           | 4,314,000         |
| USSR & Baltic                              | 723,906           | 2,620,394              | 600              | 2,300            | 21,800           | 3,369,000         |
| Scandinavia                                | 1,438,227         | 945,173                | 55,600           | 41,800           | 10,200           | 2,491,000         |
| Other Europe                               | 2,017,375         | 1,143,625              | 249,600          | 400,900          | 280,500          | 4,092,000         |
| <b>Total Europe</b>                        | <b>17,129,774</b> | <b>15,960,426</b>      | <b>1,325,600</b> | <b>1,123,400</b> | <b>587,800</b>   | <b>36,127,000</b> |
| Canada                                     | 1,051,029         | 2,126,171              | 378,000          | 413,300          | 112,500          | 4,081,000         |
| <b>Latin America &amp; Caribbean</b>       |                   |                        |                  |                  |                  |                   |
| Mexico                                     | 27,959            | 810,841                | 299,800          | 453,900          | 438,500          | 2,031,000         |
| West Indies                                | --                | 356,000 <sup>1</sup>   | 29,800           | 133,900          | 169,300          | 689,000           |
| Cuba                                       | --                | 1,400 <sup>2</sup>     | 78,900           | 208,500          | 208,200          | 497,000           |
| Other                                      | 139,896           | 242,704                | 210,400          | 506,800          | 386,200          | 1,486,000         |
| <b>Total Latin America &amp; Caribbean</b> | <b>167,855</b>    | <b>1,410,945</b>       | <b>618,900</b>   | <b>1,303,100</b> | <b>1,202,200</b> | <b>4,703,000</b>  |
| <b>Asia</b>                                |                   |                        |                  |                  |                  |                   |
| China                                      | 305,173           | 93,427                 | 9,700            | 34,800           | 69,900           | 513,000           |
| Japan                                      | 27,701            | 250,599                | 46,300           | 40,000           | 36,400           | 401,000           |
| Turkey                                     | 185,107           | 176,493                | 3,500            | 10,100           | 8,800            | 384,000           |
| Philippines                                | --                | --                     | 19,300           | 98,400           | 235,300          | 353,000           |
| Other Asia                                 | 183,819           | 60,131                 | 116,500          | 244,500          | 575,100          | 960,000           |
| <b>Total Asia</b>                          | <b>523,750</b>    | <b>580,650</b>         | <b>153,300</b>   | <b>427,800</b>   | <b>925,500</b>   | <b>2,611,000</b>  |
| All Australasia                            | 17,255            | 52,145                 | 11,500           | 19,600           | 16,500           | 117,000           |
| All Africa                                 | 1,486             | 31,214                 | 14,100           | 29,000           | 45,200           | 121,000           |
| All Other                                  | 233,675           | 40,325                 | 14,000           | 5,700            | 11,300           | 305,000           |
| <b>Total All Countries</b>                 | <b>19,124,824</b> | <b>20,201,876</b>      | <b>2,515,400</b> | <b>3,321,900</b> | <b>2,901,000</b> | <b>48,065,000</b> |

<sup>1</sup>Includes 1820 - 1950

<sup>2</sup>Prior to 1951, included with West Indies

Source: U. S. Immigration & Naturalization Service  
Strategy Research Corporation



The major Latin American countries of immigration are shown on Table IT-4. As can be seen, immigration from these areas was so small prior to 1950 that statistics were listed by Mexico and all other.

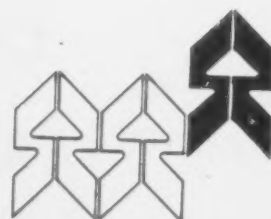
Table IT-4 shows immigration by area of last residence where visa was issued. Thus, it must be recognized that the figures for Mexico, for instance, include those Cubans fortunate enough to immigrate to Mexico and obtain Mexican visas to the U.S. as well as other nationalities who first immigrated to Mexico prior to entering the United States.

**TABLE IT-4**  
**IMMIGRATION BY AREA OF LAST**  
**RESIDENCE LATIN AMERICA &**  
**CARIBBEAN**  
**1820 - 1977**

|                                  | 1820 -<br>1900       | 1901 -<br>1950       | 1951 -<br>1960 | 1961 -<br>1970 | 1971 -<br>1977 | Total     |
|----------------------------------|----------------------|----------------------|----------------|----------------|----------------|-----------|
| Mexico                           | 27,959               | 810,841              | 299,800        | 453,900        | 438,500        | 2,031,000 |
| Cuba                             | 1                    | 1                    | 78,900         | 208,500        | 208,200        | 497,000   |
| West Indies                      | 1                    | 1                    | 29,800         | 133,900        | 169,300        | 689,000   |
| Argentina                        | 1                    | 1                    | 19,500         | 49,700         | 20,000         | 90,000    |
| Brazil                           | 1                    | 1                    | 13,800         | 29,300         | 12,400         | 55,000    |
| Colombia                         | 1                    | 1                    | 18,000         | 72,000         | 44,600         | 134,000   |
| Ecuador                          | 1                    | 1                    | 9,800          | 36,800         | 33,900         | 81,000    |
| Peru                             | 1                    | 1                    | 7,400          | 19,100         | 16,000         | 43,000    |
| El Salvador                      | 1                    | 1                    | 5,900          | 15,000         | 18,000         | 39,000    |
| Guatemala                        | 1                    | 1                    | 4,700          | 15,900         | 15,500         | 37,000    |
| Honduras                         | 1                    | 1                    | 6,000          | 15,700         | 9,600          | 31,000    |
| Panama                           | 1                    | 1                    | 11,700         | 19,400         | 13,000         | 44,000    |
| Dominican Republic               | 1                    | 1                    | 9,900          | 93,300         | 93,800         | 197,000   |
| Haiti                            | 1                    | 1                    | 4,400          | 34,500         | 37,600         | 77,000    |
| Other Latin American & Caribbean | 139,396 <sup>1</sup> | 600,104 <sup>1</sup> | 99,300         | 106,100        | 71,800         | 658,000   |
| Total Latin American & Caribbean | 167,855              | 1,410,945            | 618,900        | 1,303,100      | 1,202,200      | 4,703,000 |

<sup>1</sup> Prior to 1951 included in Other America

Source: U.S. Immigration & Naturalization Service



## U. Immigration Act of 1965

In 1965 the United States rewrote its Immigration Act. This Act abolished the ratio system by country and set a numerical limitation of 170,000 persons per year from Eastern Hemisphere countries and 120,000 per year from Western Hemisphere countries, with a 20,000 limit per country. This was the first restriction placed on immigration from Western Hemisphere countries.

While there has always been an undetermined number of people entering this country illegally, this limitation has created a backlog of applicants for visas in the Latin American countries and has created a situation where many are unwilling to wait. These people enter the country by a variety of means. Some, of course, are smuggled in, but many others enter legally on student, tourist or temporary work visas and blend into the Hispanic communities when the visas expire.

The question of how many illegal aliens are in the U.S. is one that is guaranteed to generate heated debate. Local area governments generally have much higher estimates than the federal government. Evidence of the significant size of the illegal population, as well as concern over it, is apparent in the government order to stop deporting illegal aliens between April and July, 1980, while the 1980 Census is being taken. The hope is that if the illegals know they won't be caught they will be more willing to complete census information so that there can be greater accuracy in the 1980 Census than there was in previous Census.

Of course, Hispanics are not the only group entering illegally, but their numbers are larger and they are easily able to blend into Hispanic communities.

## V. Cuban Influx

The most significant event in recent history affecting immigration in general and the Hispanic community in particular is the takeover of Cuba by Castro and the subsequent emigration of thousands of Cubans, mostly to the United States.

Not since the Jews fled Europe to escape annihilation by Hitler have so many of the ruling classes of a country emigrated from that country.

While some families were fortunate enough to anticipate events and leave before Castro's takeover, most were optimistic about the Revolution.

As it became apparent that the new government would be communist-oriented, more people left. Many sent their children away first, to Miami for schooling.

In 1962, after the missile crisis concerning the Russian missile bases in Cuba, diplomatic relations between the United States and Cuba were severed.

This left Cubans who wanted to leave with the option of flying to Mexico or Spain, where they could then apply for admission to the United States, or escaping in boats. Many thousands took the routes through Mexico and Spain, flying directly from these locales to the United States. Many others tried the more dangerous route of escaping by boat.

In 1965, with the Cuban economy stagnating, Castro announced that all who wanted to leave could leave. Flotillas of boats left from Miami to pick up these people.

To provide a safer and more orderly evacuation, President Johnson authorized the "Freedom Flights" which brought 270,000 Cubans to Miami between 1965-1973.

As the Immigration Act of 1965 limited the number of immigrants from each country, the Cuban Refugees were given a special Refugee Status. These refugees were admitted without visas and were eligible to apply for permanent residency status after they had lived in the United States for two years.

Table IV shows the number of refugees who registered at the Refugee Center in Miami between 1961-1978.

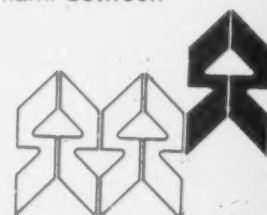




**TABLE IV**  
**CUBAN REFUGEE CENTER**  
**REGISTRATIONS**  
**1961 - 1978**

|                                              | Registered |
|----------------------------------------------|------------|
| 1961 - 1965                                  | 177,700    |
| 1966 - 1970                                  | 178,200    |
| 1970 - 1978                                  | 89,400     |
| Total Registered                             | 445,300    |
| Source: U. S. Social Security Administration |            |

These numbers do not include those who entered with a visa from Cuba or an intermediate country, but only those who escaped by boat or via the airlift or other means.

These refugees, as noted, may change their status to permanent resident after two years. Consequently they do not appear in immigration statistics until 2 or 3 years after they arrive — when they apply for this change in status. Thus the immigration figures for Cubans only reflect those who have made this application.

The arrival in Miami of these large numbers of refugees caused a permanent change in the complexion of the community. These Cubans, who arrived with little in the way of material possessions, were successful in revitalizing many areas of Metropolitan Miami and establishing the market as a truly cosmopolitan city.

In April, 1980, we saw history repeat itself as Castro announced that anyone who wished to leave Cuba could leave. Ten thousand people rushed the Peruvian Embassy. Hundreds of boats manned by Cuban exiles in Miami once again crossed the Florida straits to rescue their families.

As of this writing this renewed influx is just beginning. The people in Dade County and particularly the Exile community there have once again opened their arms, homes and pocketbooks to the newly arrived refugees.

The ultimate total of those who will reach our shores is unknown, but as has happened so often in the past, Americans will welcome them and assist them in becoming settled and independent.

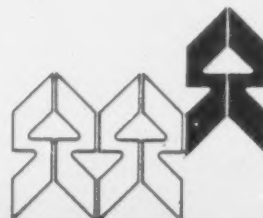
## **W. Assimilation**

Throughout the history of the United States each settled group objected to the next because of cultural differences. Gradually, however, each new group adapted itself to the other(s), inter-married, and blended into the whole.

The early Mexican American settlers have assimilated to a large degree. The American Southwest and California are good examples of two cultures blending together, with the best features of both being adopted by all. Architecture and food are but two examples.

While these early Mexican Americans have become "Americanized", the large number of recent arrivals from Mexico keep them aware of their language, culture and heritage.

The Mexicans who have arrived in this century have come not because they were forced to escape persecution, but to seek opportunities just as any American might move to seek a better job. These personal economic reasons allow for the possibility of a return home, as religious or political persecution does not.



Similar to the Mexican immigrants, Puerto Ricans enjoy considerable freedom of travel. One might become very successful in the United States and return home to visit or retire.

The Cubans, on the other hand, were fleeing political persecution and until recently had no opportunity to return to Cuba for any reason.

The large numbers of Cubans who arrived in Miami in a short period of time permitted a great deal of needed reinforcement among the refugees to help lessen the cultural shock of being wrenched from their homeland and thrust into a different way of life.

These Cubans were proud, industrious people who were determined to be independent and provide for themselves. These people, starting from scratch, built their own businesses, renovated areas into which they moved and have become an important segment of Miami and other communities to which they have moved.

In so doing, they have gravitated and settled into areas of home and business which are now predominantly Hispanic.

Even as they gradually realized a return home was not going to happen suddenly, they showed a sense of heritage and culture which they did not want their American-born children to forget.

Thus, as they learned English and adapted on their jobs to American ways, they still spoke Spanish at home and taught their children to speak it.

Many of the professional people who left Cuba have qualified to practice in the United States and opened clinics and law offices as well as businesses of every type. This wide spectrum of services has provided an attraction for newcomers of other Latin backgrounds as well as greatly increased tourism from Latin countries.

As additional Latin investment flowed into Miami, many American firms began to recognize the desirability of the area for Latin headquarters. All these events have encouraged the continuation of the Spanish language. Additionally, the cultural ties between the Spanish countries represented in business and tourism are a constant reinforcement of their Spanish heritage.

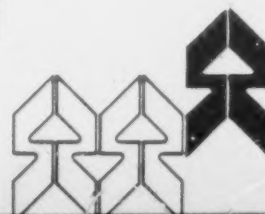
As the world becomes smaller, with increased travel and communication in all areas, it becomes more desirable to have a second language, instead of replacing one with another.

Table IW shows that the Spanish language is the fourth most frequently spoken language after Chinese, English and Russian.

**TABLE IW**  
**10 MAJOR LANGUAGES OF THE WORLD**  
**(As of Mid-Year 1979)**  
**(In Millions)**

| Language                      | Millions |
|-------------------------------|----------|
| 1 Mandarin (China)            | 690      |
| 2 English                     | 380      |
| 3 Russian                     | 259      |
| 4 Spanish                     | 238      |
| 5 Hindi                       | 230      |
| 6 Arabic                      | 142      |
| 7 Portuguese                  | 141      |
| 8 Bengali (Bangladesh, India) | 140      |
| 9 German                      | 120      |
| 10 Japanese                   | 115      |

Source: The World Almanac, 1980



When we consider these 10 major languages we can see Spanish is the most desirable Western language to know after English. The bi-lingual Hispanics in our country can communicate with more people in the world than anyone beside the Mandarin Chinese. Those who drop Spanish completely and adopt English are the poorer for it, and the Spanish-speaking people across the country realize this.

The recent surges of immigrants from Latin America coincide with the upsurge in individual human rights. Each person is encouraged to take pride in and recognize his/her own roots and heritage. Thus, rather than being encouraged to become strictly "American", immigrants/ethnic groups are encouraged to maintain their heritage and culture.

This pride in heritage is apparent in the re-emergence of awareness by other ethnic groups. Joanne Wragg in the Miami Herald recently deplored the term "Anglo" for all non-Black, non Hispanic Americans. Being Italian, not Anglo-Saxon, she resented the term being applied to her. It would be impossible to delineate white Americans by every ethnic group, but it does indicate the awareness and pride being recognized by every ethnic group.

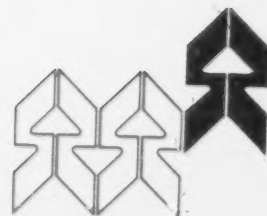
Perhaps the most significant factor influencing the assimilation process today is the ability of the current immigrants (with the exception of the Cubans) to return to their homelands if they wish to do so.

Every previous wave of immigrants has come thousands of miles across oceans to arrive on our shores. Those who came to escape religious or political persecution couldn't return for any reason. Distance, slowness of travel, time needed for such a journey and money required made it impossible for the majority to ever see their homelands again.

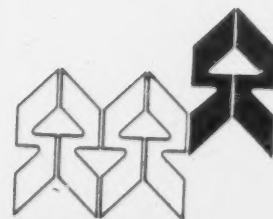
However, the Spanish immigrants of this century are virtually next door to home. With the ease in air travel they can be home in hours and many of them do travel home. Even Cubans have recently been allowed to return to Cuba for visits.

This travel and communication back and forth reinforce the language and cultural ties. Not only those who actually travel are affected. The simple proximity and number of Spanish countries near the United States creates a constant awareness of the heritage.

Assimilation has been slow because of the large numbers of recent arrivals and will never equal the absorption of other earlier groups of immigrants because of the importance of multi-language capabilities, pride of individual roots and heritage, increased flow of tourists and business between the United States and Latin America, the ability to return home and the proximity of the Latin countries.



## **II. DEMOGRAPHIC PROFILE 1980**



## II Demographic Profile 1980

From 1970 to 1980, the U.S. Hispanic population grew 65% from approximately 9 million in 1970 to the current 15 million persons. Should this rate of growth continue, the Hispanic population will reach 20 million by 1986, 25 million by late 1990 and approximately 41 million by the year 2000.

Among the primary factors contributing to this rapid growth are the larger Hispanic family (3.7 persons to 2.8 for the total U.S.), younger age (Hispanic median = 22.1, U.S. median 29.5), the higher birth rate of U.S. Hispanics in comparison to the general population and the continuous legal and illegal immigration to the United States from Spanish speaking countries. At least through the eighties, it is expected that this growth will continue and perhaps accelerate.

The Hispanic population in the United States has gradually come to be accepted as being part of American society, having demonstrated their permanence as a distinct cultural group within the United States. Particularly in the large urban areas, Hispanics have created their own neighborhoods and influenced the structure and development of the communities in which they live.

U.S. Hispanics have the highest median family income of any Hispanic country in the world. On an aggregate level, U.S. Hispanics have \$51.8 billion in gross income and a potential consumer goods market conservatively estimated at \$30 billion.

Many Hispanic families are entering, or have entered, the ranks of the middle class. In certain markets, parity between Hispanic and non-Hispanic median income levels will be achieved within the next decade.

The trends toward greater academic achievement and increased penetration of professional and managerial occupations will continue through the eighties. Currently 33.4% of Hispanic males aged 20 to 24 have completed one or more years of college. Just six years ago this ratio was 22%. Since 1973 the number of Hispanics 16 years of age and older employed in professional and managerial positions has more than doubled, from 413,000 in 1973 to 863,000 today.

Within Dade County, Florida, one-third of the Latin population occupy positions of a white collar status. In Los Angeles, nearly one-third of all Hispanics own homes. In New York, the average weekly food expenditure for Hispanic families is \$68.98—versus \$55.58 for non-Hispanics—a difference of 24%.

The increased economic, political and educational participation of Hispanics in American society has been accomplished without abandoning the Spanish language.

Among the Hispanic population of Dade County, Florida, Spanish is overwhelmingly the favored language (82.2%). In New York the incidence of Spanish being spoken exclusively or with the same frequency as English is 96.5%, in San Antonio it is 82.3% and in Los Angeles the frequency is 92.3%.

For the Hispanic youth, the ability to communicate in both Spanish and English is common. In San Antonio, 51.7% of Hispanics surveyed under 30 years of age spoke Spanish and English equally. This same pattern recurs in the other major areas with large Hispanic populations.

For the estimated 14.975 million Hispanics living in the U.S., Spanish is the primary language.

The recent "discovery" and growing appreciation of the Hispanic population as a distinct market segment reflects the sense of permanence attributed to the Hispanic community by American society. For their part, Hispanics in the United States have realized that they can participate in the mainstream of American society without having to sacrifice their Hispanic identity.

### A. World Rank

As of January 1, 1980, Strategy Research Corporation estimates the Hispanic population of the United States at 14,974,800. This makes the United States the fifth largest Spanish nation in the world, with 1.4 million more Hispanics than sixth-ranked Peru. The U.S. Hispanic population is over 40% larger than the population of Venezuela, and approximately 70% larger than the population of Cuba or Chile.





TABLE IIA

### U.S. HISPANIC\* POPULATION VERSUS OTHER HISPANIC COUNTRIES

| Country                        | Population<br>(000) |
|--------------------------------|---------------------|
| Mexico                         | 48,313.4            |
| Spain                          | 33,290.0            |
| Argentina                      | 23,983.0            |
| Columbia                       | 21,117.0            |
| United States                  | 14,974.8            |
| Peru                           | 13,586.3            |
| Venezuela                      | 10,398.9            |
| Chile                          | 8,834.8             |
| Cuba                           | 8,553.4             |
| Ecuador                        | 6,144.0             |
| Guatemala                      | 5,200.0             |
| Bolivia                        | 4,804.0             |
| Dominican Republic             | 4,011.6             |
| Commonwealth of<br>Puerto Rico | 3,484.2             |
| El Salvador                    | 3,418.5             |
| Uruguay                        | 2,900.0             |
| Honduras                       | 2,495.0             |
| Paraguay                       | 2,314.0             |
| Nicaragua                      | 1,914.0             |
| Costa Rica                     | 1,800.0             |
| Panama                         | 1,425.3             |

\*Portugal (pop. 10 mil.) and Brazil (pop. 90 mil.) not included in definition of term "Hispanic"

Source: Strategy Research Corporation  
Rand McNally World Atlas

### B. Population by Region and State

The Southwest (Arizona, New Mexico and Texas) and Pacific (California and Hawaii) Regions of the United States contain 8,751,700 Hispanics, representing 58% of the United States total Hispanic population.

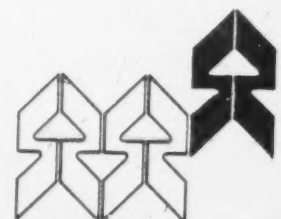
TABLE IIB-1

### 1980 U.S. HISPANIC POPULATION BY GEOGRAPHIC REGION

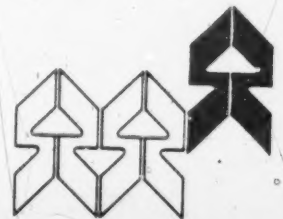
| Region    | Population<br>(000) |
|-----------|---------------------|
| Northeast | 2,791.8             |
| Southeast | 1,448.4             |
| Central   | 1,297.7             |
| Southwest | 4,656.8             |
| Northwest | 685.2               |
| Pacific   | 4,094.9             |
| Total     | 14,974.8            |

Source: Market Statistics, Inc.;  
Strategy Research Corporation

(For Geographic Regions, see Map II B on opposite page.)



**MAP II B  
GEOGRAPHIC REGIONS**

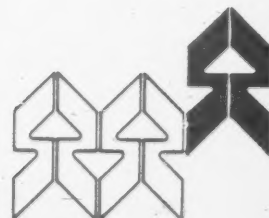


Eighty-one percent of the U.S. Hispanic population is concentrated in nine states (Arizona, California, Colorado, Florida, Illinois, New Jersey, New Mexico, New York and Texas). California is the largest single Hispanic state, followed by Texas, New York and Florida. In fact, these four states, with 10.6 million persons, encompass 71% of all United States Latins.

TABLE IIB-2

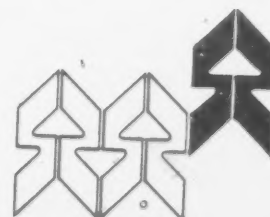
1980  
U.S. HISPANIC POPULATION  
BY REGION AND STATE

| Region/State         | Population<br>(000) |
|----------------------|---------------------|
| Northeast            | 2,791.8             |
| Connecticut          | 107.5               |
| Maine                | 5.0                 |
| Massachusetts        | 81.3                |
| New Hampshire        | 3.8                 |
| New Jersey           | 534.8               |
| New York             | 1,927.4             |
| Pennsylvania         | 120.9               |
| Rhode Island         | 8.5                 |
| Vermont              | 2.6                 |
| Southeast            | 1,448.4             |
| Alabama              | 18.1                |
| Delaware             | 8.4                 |
| District of Columbia | 29.9                |
| Florida              | 1,047.6             |
| Georgia              | 40.5                |
| Kentucky             | 14.4                |
| Louisiana            | 82.7                |
| Maryland             | 69.1                |
| Mississippi          | 10.9                |
| North Carolina       | 31.6                |
| South Carolina       | 15.4                |
| Tennessee            | 15.3                |
| Virginia             | 56.8                |
| West Virginia        | 7.7                 |



| Region/State | Population<br>(000) |
|--------------|---------------------|
| Central      | 1,297.7             |
| Arkansas     | 12.4                |
| Illinois     | 670.6               |
| Indiana      | 85.6                |
| Iowa         | 21.9                |
| Kansas       | 36.1                |
| Michigan     | 141.2               |
| Minnesota    | 26.8                |
| Missouri     | 47.5                |
| Nebraska     | 24.5                |
| North Dakota | 1.9                 |
| Ohio         | 112.5               |
| Oklahoma     | 45.7                |
| South Dakota | 3.5                 |
| Wisconsin    | 47.5                |
| Southwest    | 4,656.8             |
| Arizona      | 530.5               |
| New Mexico   | 595.0               |
| Texas        | 3,531.3             |
| Northwest    | 685.2               |
| Alaska       | 8.4                 |
| Colorado     | 380.7               |
| Idaho        | 28.0                |
| Montana      | 7.2                 |
| Nevada       | 40.9                |
| Oregon       | 44.9                |
| Utah         | 54.9                |
| Washington   | 96.8                |
| Wyoming      | 23.4                |
| Pacific      | 4,094.9             |
| California   | 4,066.0             |
| Hawaii       | 28.9                |
| Total        | 14,974.8            |

Source: Market Statistics, Inc. and  
Strategy Research Corporation



### C. Hispanic Population Growth, 1970-1980

From 1970 to 1980 the total population of the United States grew roughly 10%, from 203 million persons in 1970 to 223 million persons today. In this same ten-year span the U.S. Hispanic population increased 65%, from 9 million in 1970 to 15 million in 1980.

Every region saw substantial Latin population growth; but of particular note are the Northeast region (131% growth—primarily in the New York Metropolitan Area) and the Southeast region (92% growth—primarily in the Miami area). (See table IIC-2).

**TABLE IIC-1**  
**TOTAL U.S. POPULATION**  
**VERSUS**  
**U.S. HISPANIC POPULATION**  
**1970 AND 1980**

|                | 1970<br>(000) | 1980<br>(000) | Increase  |       |
|----------------|---------------|---------------|-----------|-------|
|                |               |               | (000)     | (%)   |
| Total U. S.    | 203,211.9     | 222,688.1     | +19,476.2 | +9.6  |
| U. S. Hispanic | 9,072.6       | 14,974.8      | +5,902.2  | +65.1 |

Source: Market Statistics, Inc.; U.S. Department of Commerce,  
Bureau of the Census; Strategy Research Corporation

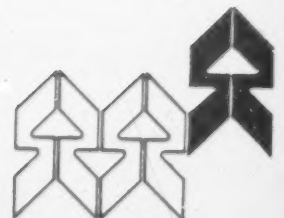




**TABLE IIC-2**  
**U.S. HISPANIC POPULATION**  
**BY REGIONS**  
**1970 VERSUS 1980**

| Region    | Population    |               | 1970-1980<br>Growth |       |
|-----------|---------------|---------------|---------------------|-------|
|           | 1970<br>(000) | 1980<br>(000) | (000)               | (%)   |
| Northeast | 1,210.5       | 2,791.8       | 1,581.3             | 130.6 |
| Southeast | 754.0         | 1,448.4       | 694.4               | 92.1  |
| Central   | 894.3         | 1,297.7       | 403.4               | 45.1  |
| Southwest | 2,800.5       | 4,656.8       | 1,856.3             | 66.3  |
| Northwest | 515.9         | 685.2         | 169.3               | 32.8  |
| Pacific   | 3,115.8       | 4,094.9       | 979.1               | 31.4  |
| Total     | 9,072.6*      | 14,974.8      | 5,683.8             | 61.2  |

Source: U. S. Department of Commerce,  
Bureau of the Census; Market Statistics Inc.;  
Strategy Research Corporation

\*The 1970 total Hispanic population (9,072.6) is the "Spanish Origin" population as taken from Census Report PC(2)-1C, *Persons of Spanish Origin*. This population was determined via a closed-ended, self-classification question. Some of the limitations involving this method include:

1. Inconsistent classification of "no answers"—in the Southwest, for example, if the entry was missing, but the person had a Spanish surname, Mexican origin was assumed.

2. Misunderstanding—some respondents interpreted the category "Central or South American" to mean Central or Southern United States; suggesting substantial overstatement in these areas.

3. Inclusion of Portuguese origin persons—some Brazilian origin residents may have reported Central or South American origin, and therefore, were classified as Spanish origin.

The 1970 Census used three other identifiers of the Spanish population: birthplace, surname (Southwest only) and language spoken.

In an effort to better estimate the 1970 Hispanic figure, Strategy Research Corporation has compiled its own 1970 county-

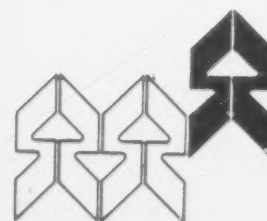
by-county Hispanic population for the entire U.S., utilizing the following sources:

1. For counties in Arizona, California, Colorado, New Mexico and Texas; the Census Report PC(2)-1D, *Persons of Spanish Surname* was used.

2. For the remaining state/county totals, the *County and City Data Book, 1972* was used. In this source, the Spanish identifier was persons of Puerto Rican birth or parentage (for New York, New Jersey and Pennsylvania) and persons of Spanish language (for the remaining 42 states and D.C.).

3. The *County and City Data Book* does not report Spanish populations for counties with less than 400 Hispanic residents. For these counties, Strategy Research Corporation included its own 1970 Spanish population estimates.

Table IIC-2 includes the 1970 Hispanic population by region from this Strategy Research Corporation compilation. The Spanish population figures utilizing this source differ somewhat from the 1970 "Spanish Origin" population in Table IIC-1. However, for consistency Table IIC-2 repeats the 1970 Census "Origin" Spanish population total.



## D. Hispanic vs. Total U.S. Population by Region and State

New Mexico is the most "Latin" state in the United States, as 45% of the population is Hispanic. North Dakota and Tennessee rank last on this index, as only .3% of their populations are Hispanic. Twenty-six percent of Texans are Hispanic; 21% of Arizonians; and 18% of Californians.

TABLE IID-1

### 1980 TOTAL U.S. POPULATION VERSUS U.S. HISPANIC POPULATION BY REGION

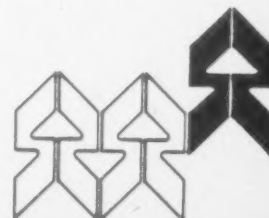
| Region    | Total<br>(000) | Hispanic<br>(000) | Hispanic<br>% of<br>Total |
|-----------|----------------|-------------------|---------------------------|
| Northeast | 49,383.1       | 2,791.8           | 5.7                       |
| Southeast | 54,026.5       | 1,448.4           | 2.7                       |
| Central   | 63,965.6       | 1,297.7           | 2.0                       |
| Southwest | 17,413.0       | 4,656.8           | 26.7                      |
| Northwest | 13,713.8       | 685.2             | 5.0                       |
| Pacific   | 24,186.1       | 4,094.9           | 16.9                      |
| Total     | 222,688.1      | 14,974.8          | 6.7                       |

Source: Market Statistics, Inc.  
Strategy Research Corporation

TABLE IID-2

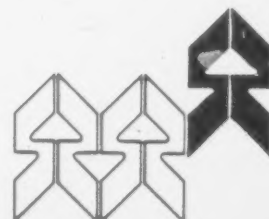
### 1980 TOTAL VERSUS HISPANIC POPULATION USA, BY STATE

| State                | Total<br>(000) | Hispanic<br>(000) | Hispanic<br>% of<br>Total |
|----------------------|----------------|-------------------|---------------------------|
| Alabama              | 3,801.5        | 18.1              | 0.5                       |
| Alaska               | 436.4          | 8.4               | 1.9                       |
| Arizona              | 2,534.8        | 530.5             | 20.9                      |
| Arkansas             | 2,223.8        | 12.4              | 0.6                       |
| California           | 23,263.7       | 4,066.0           | 17.5                      |
| Colorado             | 2,774.0        | 380.7             | 13.7                      |
| Connecticut          | 3,145.0        | 107.5             | 3.4                       |
| Delaware             | 588.8          | 8.4               | 1.4                       |
| District of Columbia | 671.7          | 29.9              | 4.5                       |
| Florida              | 9,264.9        | 1,047.6           | 11.3                      |



| State          | Total<br>(000) | Hispanic<br>(000) | Hispanic<br>% of<br>Total |
|----------------|----------------|-------------------|---------------------------|
| Georgia        | 5,177.9        | 40.5              | 0.8                       |
| Hawaii         | 922.4          | 28.9              | 3.1                       |
| Idaho          | 916.6          | 28.0              | 3.1                       |
| Illinois       | 11,421.9       | 670.6             | 5.9                       |
| Indiana        | 5,371.7        | 85.6              | 1.6                       |
| Iowa           | 2,923.8        | 21.9              | 0.7                       |
| Kansas         | 2,391.5        | 56.1              | 2.3                       |
| Kentucky       | 3,548.4        | 14.4              | 0.4                       |
| Louisiana      | 4,031.3        | 82.7              | 2.1                       |
| Maine          | 1,114.2        | 5.0               | 0.4                       |
| Maryland       | 4,201.2        | 69.1              | 1.6                       |
| Massachusetts  | 5,793.6        | 81.3              | 1.4                       |
| Michigan       | 9,214.1        | 141.2             | 1.5                       |
| Minnesota      | 4,070.9        | 26.8              | 0.7                       |
| Mississippi    | 2,444.6        | 10.9              | 0.4                       |
| Missouri       | 4,912.3        | 47.5              | 1.0                       |
| Montana        | 789.9          | 7.2               | 0.9                       |
| Nebraska       | 1,594.8        | 24.5              | 1.5                       |
| Nevada         | 691.4          | 40.9              | 5.9                       |
| New Hampshire  | 898.1          | 3.8               | 0.4                       |
| New Jersey     | 7,350.1        | 534.8             | 7.3                       |
| New Mexico     | 1,323.5        | 595.0             | 45.0                      |
| New York       | 17,843.3       | 1,927.4           | 10.8                      |
| North Carolina | 5,687.7        | 31.6              | 0.6                       |
| North Dakota   | 664.7          | 1.9               | 0.3                       |
| Ohio           | 10,764.4       | 112.5             | 1.0                       |
| Oklahoma       | 2,962.2        | 45.7              | 1.5                       |
| Oregon         | 2,498.7        | 44.9              | 1.8                       |
| Pennsylvania   | 11,806.0       | 120.9             | 1.0                       |
| Rhode Island   | 933.9          | 8.5               | 0.9                       |
| South Carolina | 2,966.1        | 15.4              | 0.5                       |
| South Dakota   | 706.9          | 3.5               | 0.5                       |
| Tennessee      | 4,442.8        | 15.3              | 0.3                       |
| Texas          | 13,554.7       | 3,531.3           | 26.1                      |
| Utah           | 1,357.2        | 54.9              | 4.0                       |
| Vermont        | 498.9          | 2.6               | 0.5                       |
| Virginia       | 5,287.1        | 56.8              | 1.1                       |
| Washington     | 3,798.5        | 96.8              | 2.5                       |
| West Virginia  | 1,912.5        | 7.7               | 0.4                       |
| Wisconsin      | 4,742.6        | 47.5              | 1.0                       |
| Wyoming        | 451.1          | 23.4              | 5.2                       |
| Total          | 222,688.1      | 14,974.8          | 6.7                       |

Source: Market Statistics, Inc., and  
Strategy Research Corporation



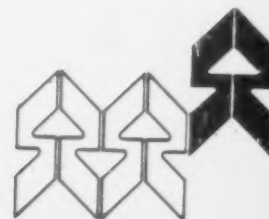
## E. Age/Sex Distribution

The average U.S. Hispanic is roughly six to seven years younger than his/her non-Hispanic counterpart. Over 40% of the U.S. Hispanic population is under 18 years old. The Median Age of U.S. Hispanics is 22.1 years of age.

TABLE III  
1980  
U.S. HISPANIC MARKET  
AGE/SEX DISTRIBUTION

|                 | U. S.<br>Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|-----------------|------------------------------------------|--------------------------------|
| Males 18-34     | 2,166.5                                  | 14.5                           |
| 35-49           | 1,076.0                                  | 7.2                            |
| 50-64           | 639.8                                    | 4.3                            |
| 65+             | 305.3                                    | 2.0                            |
| 18+             | 4,187.6                                  | 28.0                           |
| Females 18-34   | 2,454.9                                  | 16.4                           |
| 35-49           | 1,165.7                                  | 7.8                            |
| 50-64           | 710.2                                    | 4.7                            |
| 65+             | 370.6                                    | 2.5                            |
| 18+             | 4,701.4                                  | 31.4                           |
| Teens (12-17)   | 1,956.2                                  | 13.1                           |
| Children (0-11) | 4,129.6                                  | 27.6                           |
| Total Persons   | 14,974.8                                 | 100.0%                         |
| Median Age      | 22.1                                     |                                |

Source: Strategy Research Corporation



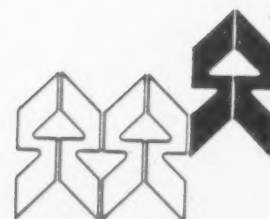
## F. Area of Origin

Of the 15 million Hispanics in the United States, 8.9 million, or 59%, are of Mexican origin. This is almost four times the size of the second largest origin sub-group, Puerto Ricans (2.2 million); and eight times larger than the third Hispanic origin segment, Central/South Americans (1.1 million). Note that the census definition of "Origin" has not been consistent over the years. It has even varied by regions across the country. Basically it is a self-classification definition.

**TABLE IIF**  
**AREA OF ORIGIN**  
**U.S. HISPANIC POPULATION**  
**1980**

|                             | Number<br>of<br>Persons<br>(000) | Percent<br>Distribution<br>(%) |
|-----------------------------|----------------------------------|--------------------------------|
| Mexico                      | 8,895.0                          | 59.4                           |
| Puerto Rico                 | 2,261.2                          | 15.1                           |
| Central or South<br>America | 1,108.1                          | 7.4                            |
| Cuba                        | 883.5                            | 5.9                            |
| Other                       | 1,826.9                          | 12.2                           |
| <b>TOTAL</b>                | <b>14,974.8</b>                  | <b>100.0</b>                   |

Source: U. S. Bureau of the Census;  
Strategy Research Corporation





## G. Household Size

The fact that Spanish families are larger than non-Spanish families has long been documented. The average household size for the U.S. Hispanic market is 3.7 persons. For the total United States, the average household size is 2.8 persons.

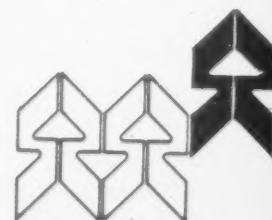
It is interesting to note that Cuban households are substantially smaller than Mexican households (3.3 persons vs 3.9 persons); however, even the Cuban figure is well above the (2.8) total population estimate.

**TABLE IIG**  
**1980**  
**U.S. HISPANIC MARKET**  
**HOUSEHOLD SIZE**  
**BY TYPE OF SPANISH ORIGIN**

| Household Size         | U. S.<br>Hispanic | Mexican<br>Origin | Puerto<br>Rican<br>Origin | Cubin<br>Origin | Other*<br>Spanish | Total<br>U.S. |
|------------------------|-------------------|-------------------|---------------------------|-----------------|-------------------|---------------|
| All Households (000)   | 3,998.1           | 2,280.7           | 611.1                     | 267.7           | 838.6             | 78,716.2      |
| 1-2 Persons            | 24.7%             | 22.8%             | 25.7%                     | 35.3%           | 29.6%             | 50.5%         |
| 3 Persons              | 23.7              | 21.6              | 22.1                      | 25.8            | 27.7              | 17.8          |
| 4 Persons              | 23.7              | 24.5              | 24.1                      | 17.8            | 21.1              | 16.6          |
| 5 Persons              | 14.8              | 16.5              | 17.4                      | 17.5            | 10.7              | 8.8           |
| 6 Persons              | 7.3               | 8.8               | 5.5                       | 3.9             | 5.3               | 3.7           |
| 7 Persons +            | 5.7               | 6.0               | 5.2                       | 3.6             | 5.1               | 2.6           |
| Mean Number of Persons | 3.7               | 3.9               | 3.7                       | 3.3             | 3.5               | 2.8           |

\*Includes Central or South American, and Other Spanish Origin.

Source: U. S. Bureau of the Census  
Strategy Research Corporation



## H. Median Income

Although the U.S. Hispanic median family income is below the total United States median figure—\$12,952 vs \$19,116—the fact is that U.S. Latin families are the wealthiest Hispanics in the world.

By region (Table IIH-2) Hispanic families in the Southeast earn the most (\$15,681), and those residing in the Northeast earn the least (\$9,368). The Southwest region, with a Hispanic median family income of \$12,701, comes closest to the national Hispanic median of \$12,952. Based on regional concentrations of the origin groups, this is consistent with Table IIH-1.

TABLE IIH-1

**1980  
U.S. HISPANIC MARKET  
MEDIAN FAMILY INCOME  
BY TYPE OF SPANISH ORIGIN**

|                       | 1971     | 1978     | 1980     |
|-----------------------|----------|----------|----------|
| Total Spanish Origin  | \$ 7,379 | \$11,421 | \$12,952 |
| Mexican Origin        | 7,171    | 11,742   | 13,439   |
| P. R. Origin          | 6,011    | 7,972    | 8,787    |
| Other Spanish Origin* | 8,677    | 13,514   | 15,342   |
| U. S. Total           | 10,474   | 16,786   | 19,116   |

\*Includes Cuban, Central or South American, and other Spanish origin.

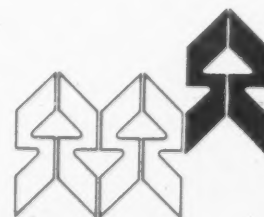
Source: U. S. Bureau of the Census; Strategy Research Corporation

TABLE IIH-2

**1980  
U.S. HISPANIC MARKET  
MEDIAN FAMILY INCOME  
BY REGION**

| Region               | Median<br>Income |
|----------------------|------------------|
| Northeast            | \$ 9,368         |
| Southeast            | 15,681           |
| Central              | NA               |
| Southwest            | 12,701           |
| Northwest            | NA               |
| Pacific              | 13,876           |
| Total U. S. Hispanic | \$12,952         |

Source: U. S. Department of Commerce,  
U. S. Bureau of the Census;  
Strategy Research Corporation



## I. Education

Of the Hispanic population 25 years of age and over, 43.1% have completed four years of high school or more. The trend towards higher educational attainment among the younger population is evident in Table II I-1. Among young adults, 20-24 years of age, 63.9% have completed four years of high school or more. In fact, 28% of these 20-24 year olds have completed at least one year of college.

**TABLE II I-1**  
**1980**  
**U.S. HISPANIC MARKET**  
**EDUCATION LEVEL BY AGE/SEX**  
**AND TYPE OF SPANISH ORIGIN**

| Age, Sex and Type<br>of Spanish Origin  | Total<br>(000) | Percent | Years of School Completed |        |         |             |         |         |              |
|-----------------------------------------|----------------|---------|---------------------------|--------|---------|-------------|---------|---------|--------------|
|                                         |                |         | Elementary School         |        |         | High School |         | College |              |
|                                         |                |         | 0 To 4                    | 5 To 7 | 8 Years | 1 To 3      | 4 Years | 1 To 3  | 4 or<br>More |
| <b>Total</b>                            |                |         |                           |        |         |             |         |         |              |
| <b>Total Spanish Origin</b>             |                |         |                           |        |         |             |         |         |              |
| 14 Years & Over                         | 10,199         | 100.0%  | 11.8%                     | 15.5%  | 9.3%    | 22.3%       | 24.6%   | 10.9%   | 5.6%         |
| 14-19                                   | 1,876          | 100.0   | 2.6                       | 13.3   | 18.1    | 50.5        | 12.7    | 2.8     | -            |
| 20-24                                   | 1,544          | 100.0   | 3.0                       | 8.2    | 4.6     | 20.5        | 35.7    | 26.1    | 2.1          |
| 25 & Over                               | 6,785          | 100.0   | 14.0                      | 17.8   | 8.1     | 15.0        | 25.4    | 9.8     | 7.9          |
| <b>Mexican Origin</b>                   |                |         |                           |        |         |             |         |         |              |
| 14 Years & Over                         | 5,933          | 100.0   | 15.2                      | 17.5   | 8.4     | 22.0        | 23.7    | 9.7     | 3.5          |
| 14-19                                   | 1,085          | 100.0   | 3.9                       | 13.6   | 17.7    | 50.6        | 13.0    | 1.3     | -            |
| 20-24                                   | 1,023          | 100.0   | 3.3                       | 10.8   | 5.2     | 20.1        | 39.4    | 20.3    | 1.3          |
| 25 & Over                               | 3,825          | 100.0   | 21.5                      | 20.6   | 6.7     | 14.4        | 22.6    | 9.4     | 4.9          |
| <b>Puerto Rican Origin</b>              |                |         |                           |        |         |             |         |         |              |
| 14 Years & Over                         | 1,478          | 100.0   | 10.1                      | 14.6   | 12.2    | 29.5        | 22.9    | 7.8     | 3.1          |
| 14-19                                   | 307            | 100.0   | 2.4                       | 14.6   | 20.4    | 53.0        | 7.2     | 2.5     | -            |
| 20-24                                   | 166            | 100.0   | (B)                       | (B)    | (B)     | (B)         | (B)     | (B)     | (B)          |
| 25 & Over                               | 1,005          | 100.0   | 13.7                      | 16.5   | 9.9     | 21.0        | 28.2    | 6.9     | 4.2          |
| <b>Other Spanish Origin<sup>1</sup></b> |                |         |                           |        |         |             |         |         |              |
| 14 Years & Over                         | 2,786          | 100.0   | 5.1                       | 11.7   | 9.9     | 19.5        | 27.4    | 15.3    | 11.5         |
| 14-19                                   | 478            | 100.0   | .5                        | 12.0   | 16.9    | 48.3        | 14.7    | 7.4     | -            |
| 20-24                                   | 354            | 100.0   | 2.2                       | 2.6    | 1.2     | 15.2        | 32.2    | 42.1    | 4.5          |
| 25 & Over                               | 1,954          | 100.0   | 6.9                       | 13.0   | 10.0    | 13.2        | 29.7    | 12.2    | 15.6         |

<sup>1</sup> Includes Cuban, Central and South American, and other Spanish origin.  
(B) Represents base of less than 80,000.

Source: Strategy Research Corporation; U. S. Bureau of the Census

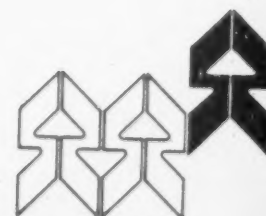
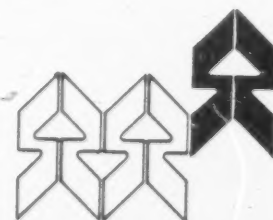


**TABLE II-2**  
**1980**  
**U.S. HISPANIC MARKET**  
**EDUCATION LEVEL BY AGE/SEX AND**  
**TYPE OF SPANISH ORIGIN**  
**MARCH 1980**  
**(Males & Females)**

| Age, Sex and Type<br>of Spanish Origin | Total<br>(000) | Percent            | Years of School Completed |                   |                   |                   |                   |                   |                  |  |
|----------------------------------------|----------------|--------------------|---------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|------------------|--|
|                                        |                |                    | Elementary School         |                   |                   | High School       |                   | College           |                  |  |
|                                        |                |                    | 0 To 4                    | 5 To 7            | 8 Years           | 1 To 3            | 4 Years           | 1 To 3            | 4 or<br>More     |  |
| <b>Male</b>                            |                |                    |                           |                   |                   |                   |                   |                   |                  |  |
| Total Spanish Origin                   |                |                    |                           |                   |                   |                   |                   |                   |                  |  |
| 14 Years & Over                        | 4,866          | 100.0 <sup>1</sup> | 10.5 <sup>1</sup>         | 15.0 <sup>1</sup> | 10.0 <sup>1</sup> | 22.8 <sup>1</sup> | 22.7 <sup>1</sup> | 12.7 <sup>1</sup> | 6.4 <sup>1</sup> |  |
| 14-19                                  | 946            | 100.0              | 1.9                       | 11.3              | 21.1              | 53.4              | 10.5              | 1.9               | -                |  |
| 20-24                                  | 742            | 100.0              | 1.5                       | 9.3               | 4.5               | 15.8              | 35.7              | 31.2              | 2.2              |  |
| 25 & Over                              | 3,178          | 100.0              | 15.0                      | 17.5              | 8.1               | 15.2              | 23.4              | 11.6              | 9.4              |  |
| Mexican Origin                         |                |                    |                           |                   |                   |                   |                   |                   |                  |  |
| 14 Years & Over                        | 2,891          | 100.0              | 13.7                      | 17.1              | 9.4               | 21.2              | 23.6              | 11.7              | 3.3              |  |
| 14-19                                  | 513            | 100.0              | 3.3                       | 9.6               | 23.4              | 52.2              | 11.3              | .5                | -                |  |
| 20-24                                  | 492            | 100.0              | 2.8                       | 12.2              | 4.5               | 17.6              | 39.0              | 23.3              | .9               |  |
| 25 & Over                              | 1,886          | 100.0              | 19.2                      | 20.8              | 7.0               | 13.7              | 22.9              | 11.9              | 4.8              |  |
| Puerto Rican Origin                    |                |                    |                           |                   |                   |                   |                   |                   |                  |  |
| 14 Years & Over                        | 640            | 100.0              | 8.6                       | 13.7              | 13.2              | 32.3              | 19.6              | 10.0              | 2.8              |  |
| 14-19                                  | 160            | 100.0              | 2.4                       | 18.9              | 17.1              | 52.1              | 9.5               | -                 | -                |  |
| 20-24                                  | 73             | 100.0              | (B)                       | (B)               | (B)               | (B)               | (B)               | (B)               | (B)              |  |
| 25 & Over                              | 407            | 100.0              | 13.7                      | 12.9              | 10.2              | 24.6              | 24.2              | 10.1              | 4.6              |  |
| Other Spanish Origin <sup>1</sup>      |                |                    |                           |                   |                   |                   |                   |                   |                  |  |
| 14 Years & Over                        | 1,335          | 100.0              | 4.2                       | 11.1              | 10.0              | 21.5              | 22.2              | 16.2              | 15.0             |  |
| 14-19                                  | 273            | 100.0              | -                         | 10.8              | 18.6              | 54.1              | 9.0               | 7.3               | -                |  |
| 20-24                                  | 177            | 100.0              | -                         | 3.0               | -                 | 6.6               | 33.7              | 49.5              | 7.2              |  |
| 25 & Over                              | 885            | 100.0              | 6.7                       | 12.6              | 9.6               | 14.0              | 24.2              | 12.0              | 21.0             |  |
| <b>Female</b>                          |                |                    |                           |                   |                   |                   |                   |                   |                  |  |
| Total Spanish Origin                   |                |                    |                           |                   |                   |                   |                   |                   |                  |  |
| 14 Years & Over                        | 5,333          | 100.0 <sup>1</sup> | 13.0 <sup>1</sup>         | 15.9 <sup>1</sup> | 8.7 <sup>1</sup>  | 21.9 <sup>1</sup> | 26.4 <sup>1</sup> | 9.3 <sup>1</sup>  | 4.8 <sup>1</sup> |  |
| 14-19                                  | 924            | 100.0              | 3.4                       | 15.4              | 15.0              | 47.6              | 15.0              | 3.7               | -                |  |
| 20-24                                  | 802            | 100.0              | 4.5                       | 7.1               | 4.6               | 24.8              | 35.8              | 21.3              | 2.0              |  |
| 25 Years & Over                        | 3,607          | 100.0              | 17.1                      | 18.0              | 8.1               | 14.9              | 27.2              | 8.2               | 6.6              |  |
| Mexican Origin                         |                |                    |                           |                   |                   |                   |                   |                   |                  |  |
| 14 Years & Over                        | 3,043          | 100.0              | 16.7                      | 17.9              | 7.4               | 22.7              | 23.8              | 7.9               | 3.7              |  |
| 14-19                                  | 572            | 100.0              | 4.4                       | 17.2              | 12.6              | 49.2              | 14.6              | 2.0               | -                |  |
| 20-24                                  | 531            | 100.0              | 3.8                       | 9.5               | 5.9               | 22.4              | 39.7              | 17.6              | 1.6              |  |
| 25 Years & Over                        | 1,940          | 100.0              | 23.7                      | 20.5              | 6.4               | 15.1              | 22.3              | 6.9               | 5.1              |  |
| Puerto Rican Origin                    |                |                    |                           |                   |                   |                   |                   |                   |                  |  |
| 14 Years & Over                        | 838            | 100.0              | 11.2                      | 15.3              | 11.4              | 27.3              | 25.5              | 6.2               | 3.3              |  |
| 14-19                                  | 147            | 100.0              | 2.3                       | 9.9               | 23.9              | 54.0              | 4.8               | 5.2               | -                |  |
| 20-24                                  | 93             | 100.0              | (B)                       | (B)               | (B)               | (B)               | (B)               | (B)               | (B)              |  |
| 25 Years & Over                        | 598            | 100.0              | 13.7                      | 18.9              | 9.7               | 18.5              | 31.0              | 4.7               | 3.9              |  |
| Other Spanish Origin <sup>1</sup>      |                |                    |                           |                   |                   |                   |                   |                   |                  |  |
| 14 Years & Over                        | 1,452          | 100.0              | 5.9                       | 12.2              | 9.8               | 17.7              | 32.2              | 14.4              | 8.2              |  |
| 14-19                                  | 205            | 100.0              | 1.2                       | 13.6              | 14.8              | 40.5              | 22.3              | 7.6               | -                |  |
| 20-24                                  | 178            | 100.0              | 4.4                       | 2.2               | 2.4               | 23.7              | 30.7              | 34.8              | 1.8              |  |
| 25 Years & Over                        | 1,069          | 100.0              | 7.0                       | 13.4              | 10.3              | 12.6              | 34.2              | 12.3              | 11.1             |  |

<sup>1</sup> Includes Cuban, Central or South American, and other Spanish origin.  
(B) Represents base of less than 80,000.

Source: Strategy Research Corporation; U. S. Bureau of the Census.



## J. Employment

Table II J-1 depicts occupation and employment status of Hispanic persons 16 years of age and older. The leading occupation category is "Operatives and Laborers" (Blue Collar), followed by "Service Workers". Within the individual origin groups there is some departure from this norm. Among Mexican-origin Hispanics, the second largest-occupation category (after Operatives and Laborers) is "Craft and Kindred Workers" (Skilled Labor). Among Cuban-origin Hispanics, substantial numbers are in the "Professional, Technical" and "Manager, Administrator" fields.

Table II J-2 segments these data for Males. Among Hispanic Females 16 +, the leading occupational category is "Clerical and Kindred Workers".

**TABLE II J-1**  
**1980 U.S. HISPANIC MARKET**  
**EMPLOYMENT BY TYPE OF SPANISH ORIGIN**  
**AND EMPLOYMENT CATEGORY**

| Employment Status and Occupation            | Total  | Spanish Origin |              |        |        |
|---------------------------------------------|--------|----------------|--------------|--------|--------|
|                                             |        | Mexican        | Puerto Rican | Cuban  | Other* |
| <b>Total</b>                                |        |                |              |        |        |
| Persons 16 Years Old & Over (Thousands)     | 9,446  | 5,541          | 1,265        | 523    | 2,117  |
| Employed . . . . Thousands                  | 5,602  | 3,411          | 597          | 385    | 1,209  |
| Percent . . .                               | 100.0% | 100.0%         | 100.0%       | 100.0% | 100.0% |
| Professional, Technical and Kindred Workers | 8.9%   | 6.7%           | 9.1%         | 17.9%  | 12.3%  |
| Managers and Administrators                 | 6.5    | 5.5            | 5.5          | 16.1   | 6.6    |
| Sales Workers                               | 4.3    | 4.0            | 6.6          | 4.6    | 4.7    |
| Clerical and Kindred Workers                | 14.3   | 12.9           | 24.0         | 12.3   | 13.4   |
| Craft and Kindred Workers                   | 13.8   | 16.6           | 9.9          | 10.6   | 8.8    |
| Operatives and Laborers                     | 34.9   | 38.4           | 33.3         | 22.0   | 30.3   |
| Service Workers                             | 17.3   | 16.2           | 11.9         | 16.5   | 23.9   |

\*Includes Central or South American Origin and Other Spanish Origin.

Source: Strategy Research Corporation

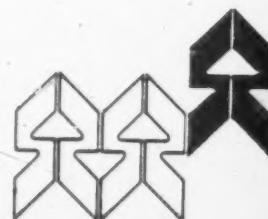




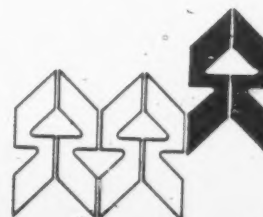
TABLE III-2

**1980  
U.S. HISPANIC MARKET  
EMPLOYMENT BY TYPE OF SPANISH ORIGIN  
AND EMPLOYMENT CATEGORY  
(Males & Females)**

| Employment Status and Occupation            | Total  | Mexican | Spanish Origin |        |        |
|---------------------------------------------|--------|---------|----------------|--------|--------|
|                                             |        |         | Puerto Rican   | Cuban  | Other* |
| <b>Male</b>                                 |        |         |                |        |        |
| Persons 16 Years Old & Over (Thousands)     | 4,440  | 2,694   | 522            | 219    | 1,005  |
| Employed. . . .Thousands                    | 3,444  | 2,136   | 372            | 228    | 708    |
| Percent. . . .                              | 100.0% | 100.0%  | 100.0%         | 100.0% | 100.0% |
| Professional, Technical and Kindred Workers | 8.3%   | 5.1%    | 7.5%           | 20.8%  | 14.2%  |
| Managers and Administrators                 | 7.7    | 6.6     | 3.1            | 22.6   | 7.8    |
| Sales Workers                               | 2.8    | 2.3     | 4.8            | 1.7    | 3.5    |
| Clerical and Kindred Workers                | 5.6    | 4.9     | 14.9           | 0.9    | 4.1    |
| Craft and Kindred Workers                   | 21.8   | 26.1    | 15.0           | 14.8   | 14.3   |
| Operatives and Laborers                     | 40.3   | 43.3    | 39.2           | 28.9   | 36.4   |
| Service Workers                             | 13.5   | 12.1    | 15.6           | 10.3   | 19.7   |
| <b>Female</b>                               |        |         |                |        |        |
| Persons 16 Years Old & Over (Thousands)     | 5,006  | 2,847   | 743            | 304    | 1,112  |
| Employed. . . .Thousands                    | 2,158  | 1,275   | 225            | 157    | 501    |
| Percent. . . .                              | 100.0% | 100.0%  | 100.0%         | 100.0% | 100.0% |
| Professional, Technical and Kindred Workers | 10.0%  | 9.2%    | 11.7%          | 14.2%  | 9.8%   |
| Managers and Administrators                 | 4.9    | 3.8     | 9.6            | 7.0    | 4.6    |
| Sales Workers                               | 6.8    | 6.4     | 9.3            | 9.1    | 5.8    |
| Clerical and Kindred Workers                | 28.0   | 26.1    | 39.3           | 27.8   | 26.4   |
| Craft and Kindred Workers                   | 0.9    | 0.8     | 1.3            | 4.5    | 0.5    |
| Operatives and Laborers                     | 26.3   | 31.2    | 23.2           | 13.3   | 22.6   |
| Service Workers                             | 23.1   | 22.7    | 5.6            | 24.3   | 30.3   |

\*Includes Central or South American Origin and Other Spanish Origin.

Source: Strategy Research Corporation



## K. Metro/Non-Metro Residence

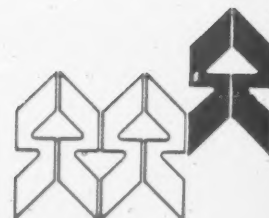
The Hispanic population of the United States is overwhelmingly concentrated in Metropolitan areas. Fully 82.5% of U.S. Latins reside within Metros. Roughly two-thirds of the non-Hispanic U.S. population reside inside Metropolitan areas.

TABLE IIIK  
U.S. HISPANIC MARKET  
1980  
METROPOLITAN/NON-METROPOLITAN RESIDENCE

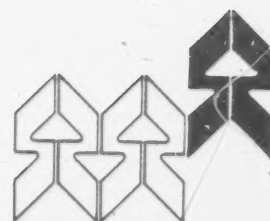
|                        | U. S.<br>Hispanic | Mexican<br>Origin | Puerto<br>Rican<br>Origin | Other*<br>Spanish |
|------------------------|-------------------|-------------------|---------------------------|-------------------|
| All Families (000)     | 3,998.1           | 2,280.7           | 611.1                     | 1,106.3           |
| Metropolitan Areas     | 82.5%             | 83.3%             | 95.6%                     | 88.0%             |
| Non-Metropolitan Areas | 17.5              | 16.7              | 4.4                       | 12.0              |

\*Includes Cuban, Central or South American, and Other Spanish Origin.

Source: Strategy Research Corporation



### **III. MARKET BY MARKET**



### III. Market by Market

#### TOP 30 HISPANIC ADI'S

Market by Market briefly discusses the thirty largest Hispanic ADI's\* in the U.S. mainland, drawing attention to their demographic similarities and differences. As the top thirty Hispanic ADI's constitute over 85% of the total Hispanic population, the cumulative picture they offer is closely representative of the national U.S. Hispanic market.

At the national level, the U.S. Hispanic market shares a number of demographic characteristics that begins to define U.S. Hispanics as a separate market segment. The national U.S. Hispanic market has larger and younger families than the general population. U.S. Hispanics are more geographically concentrated and more heavily urban than the general population. The disproportionately fast growth experienced by the U.S. Hispanic population, in comparison to the general population, also contributes to a demographic definition of the national U.S. Hispanic population as a distinct market segment.

All these qualities are evident in varying degrees in each of the top thirty U.S. Hispanic ADI's. Regional differences are also evident, notably in the country of origin of the Hispanic populations in each of the cities. Fluctuations exist in the degree of Hispanic concentration within the Metro areas, income and spending power and the percentage of the total ADI population which the Hispanic population represents.

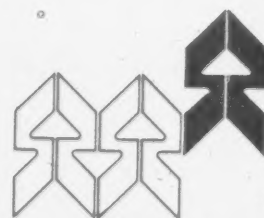
Notwithstanding the existing demographic differences among the top thirty U.S. Hispanic ADI's the U.S. Hispanic population shares far more basic demographic similarities than differences.

More importantly, the U.S. Hispanic population shares certain cultural characteristics that established it as a distinct and identifiable segment of the general population. The Spanish language, more than any other single identifier, culturally describes the U.S. Hispanic population being perhaps its most definitive and universal characteristic. The origin of the U.S. Hispanic population may vary from Mexican to Puerto Rican, from Cuban to Latin American, but every Hispanic origin group has purposefully insisted on maintaining the Spanish language alive, particularly in the home.

Each Hispanic origin group also has its own unique heritage and history, celebrating different national holidays which are commemorated in their home countries. Nevertheless, U.S. Hispanics share basic cultural values and traditions that have much more to do with being Hispanic than with being from any single Hispanic country. The U.S. Hispanic population embraces a close family orientation, the extended family not being uncommon. As an entity, U.S. Hispanics also adhere to a strong Catholic tradition as one of their most salient cultural characteristics. These shared cultural traits have much greater impact on shaping behavior attitudes and perceptions than the individual history of a specific country of origin.

Whether in terms of demographics or cultural values, the Hispanic populations in the top thirty U.S. Hispanic ADI's are different in degree rather than in kind. The similarities they share far outweigh the differences and it is exactly these similarities and shared qualities that define the national U.S. Hispanic market.

\*Areas of Dominant Influence as defined by Arbitron in their Media Audience Estimate Studies includes U.S. Counties and excludes non-U.S. areas.



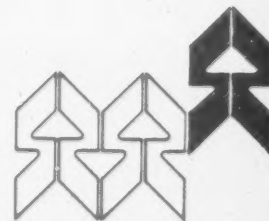
## A. Top 30 Hispanic ADI's

The U.S. Hispanic population is heavily concentrated in relatively few markets. Over 85% of the U.S. Hispanic population resides within the top 30 Hispanic markets. In fact, the top 10 ADI's contain 9,502,000 Hispanics, 63% of the total U.S. Hispanic population. An astounding 31% of all U.S. Hispanics live in the New York and Los Angeles ADI's.

**TABLE IIIA**  
**TOP 30 HISPANIC ADI's**  
**1980**

| Rank                                           | ADI                       | Hispanic<br>Population<br>(000) |
|------------------------------------------------|---------------------------|---------------------------------|
| 1                                              | New York                  | 2,329.8                         |
| 2                                              | Los Angeles               | 2,256.8                         |
| 3                                              | San Antonio               | 849.6                           |
| 4                                              | Miami                     | 767.4                           |
| 5                                              | San Francisco             | 705.8                           |
| 6                                              | Chicago                   | 660.1                           |
| 7                                              | McAllen - Brownsville     | 533.8                           |
| 8                                              | El Paso                   | 474.3                           |
| 9                                              | Albuquerque               | 465.6                           |
| 10                                             | Houston                   | 459.4                           |
| 11                                             | Phoenix                   | 311.6                           |
| 12                                             | Fresno                    | 298.6                           |
| 13                                             | Corpus Christi            | 293.8                           |
| 14                                             | San Diego                 | 274.4                           |
| 15                                             | Sacramento-Stockton       | 274.4                           |
| 16                                             | Dallas - Fort Worth       | 257.0                           |
| 17                                             | Denver                    | 232.0                           |
| 18                                             | Philadelphia              | 183.0                           |
| 19                                             | Tucson                    | 182.1                           |
| 20                                             | Austin                    | 139.8                           |
| 21                                             | Tampa - St. Petersburg    | 133.2                           |
| 22                                             | Lubbock                   | 128.7                           |
| 23                                             | Salinas - Monterey        | 108.6                           |
| 24                                             | Laredo                    | 106.9                           |
| 25                                             | Odessa - Midland          | 104.2                           |
| 26                                             | Colorado Springs - Pueblo | 102.5                           |
| 27                                             | Washington, D. C.         | 100.0                           |
| 28                                             | El Centro - Yuma          | 79.5                            |
| 29                                             | Detroit                   | 70.8                            |
| 30                                             | Waco - Temple             | 67.7                            |
| Total                                          |                           | 12,955.6                        |
| Top 30 as a Percent of<br>Total U. S. Hispanic |                           | 86.5%                           |

Source: Strategy Research Corporation





## ADI-1

### New York

The New York ADI is the number one Hispanic market in the U.S. There is a total of 2,329,800 Hispanics in the ADI and these are heavily concentrated in the five boroughs of New York City, with about 70% of all Hispanics in the ADI living in Bronx, Kings, New York, Queens and Richmond counties. Better than one out of every 5 persons living in the five boroughs of New York City are Hispanic.

Referring to Table IIIA-1a we see that there are approximately 1,631,900 Hispanics living in New York City. If we include the adjacent counties (Nassau, Suffolk, Westchester, Bergen, Hudson, Essex, Passaic, Union and Middlesex), this figure expands to 2,191,000 Hispanics, or about 94% of the total New York ADI Hispanic population.

During the early stages of Hispanic population growth in the New York ADI, much of the movement was to the Bronx area. However, between 1970 and 1980, the New Jersey area has shown a significant growth in Hispanic population. Specifically, from 1970 to 1980 the Hispanic population in New Jersey increased by over 300% or in absolute terms, by about 337,300 persons.

Even more dramatic is the Hispanic growth in Queens County. From 1970 to 1980 the Latin population of Queens rose 707% from 33,800 to 272,600 Hispanic persons. During this same period, total population in Queens actually declined slightly (1,986,500 to 1,981,400). In this same ten year period, while the Spanish population for all five boroughs doubled (810,200 to 1,631,900), the total city population dropped 8% (from 7,894,800 in 1970 to 7,228,300 in 1980).

Puerto Ricans are the largest single group, comprising over 56% of the New York ADI Hispanic population. There are currently more Puerto Ricans living in the New York ADI than in the San Juan, Puerto Rico Metropolitan Area.

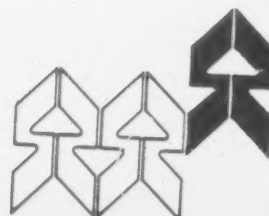


TABLE IIIA-1a  
NEW YORK ADI

| Counties               | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|------------------------|-----------------------------------------|-----------------------------------------|
| Bronx, New York        | 316.4                                   | 483.8                                   |
| Dutchess               | 1.6                                     | 6.4                                     |
| Kings                  | 270.6                                   | 468.7                                   |
| Nassau                 | 7.1                                     | 54.7                                    |
| New York               | 184.7                                   | 385.7                                   |
| Orange                 | 2.9                                     | 9.4                                     |
| Putnam                 | 0.5                                     | 1.2                                     |
| Queens                 | 33.8                                    | 272.6                                   |
| Richmond               | 4.7                                     | 21.1                                    |
| Rockland               | 3.9                                     | 14.4                                    |
| Suffolk                | 16.9                                    | 77.6                                    |
| Sullivan               | 0.8                                     | 2.5                                     |
| Ulster                 | 1.7                                     | 5.3                                     |
| Westchester            | 5.4                                     | 36.2                                    |
| Bergen, New Jersey     | 3.6                                     | 41.3                                    |
| Essex                  | 28.8                                    | 83.7                                    |
| Hudson                 | 32.3                                    | 137.6                                   |
| Hunterdon              | 0.7                                     | 2.0                                     |
| Middlesex              | 11.1                                    | 37.3                                    |
| Monmouth               | 3.7                                     | 17.9                                    |
| Morris                 | 2.7                                     | 15.7                                    |
| Ocean                  | 2.5                                     | 12.9                                    |
| Passaic                | 19.8                                    | 52.5                                    |
| Somerset               | 0.8                                     | 6.7                                     |
| Sussex                 | 1.4                                     | 3.7                                     |
| Union                  | 4.9                                     | 38.2                                    |
| Fairfield, Connecticut | 28.5                                    | 40.6                                    |
| Pike, Pennsylvania     | 0.1                                     | 0.1                                     |
| TOTAL                  | 991.9                                   | 2,329.8                                 |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

Other Hispanic groups represented in the area include Dominicans, Cubans, Colombians, Argentinians and Ecuadoreans and the proportion of non-Puerto Rican Hispanics appears to be increasing. In fact, much of the tremendous Hispanic growth in Queens and New Jersey is attributable to the influx of non-Puerto Rican Latins.

The Hispanic population in the New York ADI is relatively young. Table IIIA-1b shows that slightly more than 39% of these Hispanics are under 18 years of age, and about 70% are under 35 years old.

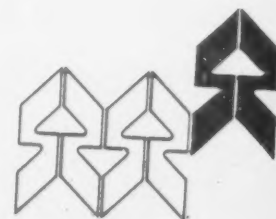


**TABLE IIIA-1b**  
**NEW YORK ADI**  
**HISPANIC AGE/SEX DISTRIBUTION**

|               | Population<br>(000) | Percent<br>Distribution<br>(%) |
|---------------|---------------------|--------------------------------|
| Males 18-34   | 328.5               | 14.1%                          |
| 35-49         | 172.4               | 7.4                            |
| 50-64         | 97.9                | 4.2                            |
| 65+           | 30.3                | 1.3                            |
| Females 18-34 | 398.4               | 17.1                           |
| 35-49         | 219.0               | 9.4                            |
| 50-64         | 118.8               | 5.1                            |
| 65+           | 53.6                | 2.3                            |
| Teens 12-17   | 274.9               | 11.8                           |
| Children 0-11 | 636.0               | 27.3                           |
| <b>TOTAL</b>  | <b>2,329.8</b>      | <b>100.0%</b>                  |

Source: Market Statistics, Inc.  
Strategy Research Corporation

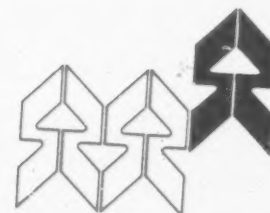
Hispanic households have historically been larger in size than non-Hispanic households, and although we have experienced an overall trend toward fewer persons per household unit, Hispanic households continue to be substantially larger than their non-Spanish counterparts. The most recent figures, documented in 1977, show Hispanic household size at 3.7 members, compared with 3.1 persons per non-Hispanic household.

One often cited characteristic of the Hispanic is the high degree of language and culture retention and the hesitancy of this group to become completely integrated into American society.

In the New York ADI, 58.8% of the Hispanics speak mostly Spanish at home, while 37.7% speak English and Spanish equally. Thus, while a significant proportion of Hispanics in the area are speaking two languages, the majority maintain the use of their native tongue in the home.

Along with the continued growth in the New York Hispanic market since the 1970 Census, we have seen an increase in their spending power. With a larger household size, Hispanics spend 24% more in food stores, as surveyed in 1977.

Total spending power of the New York Hispanic market has been estimated at \$5.5 billion and rapidly rising.



## ADI-2

# Los Angeles

The Los Angeles ADI is the number two ranked Hispanic ADI in the United States, with a current estimate of 2,256,800 Hispanic persons situated within the Los Angeles County has by far the largest Hispanic population of any county in the U.S., with a 1980 estimate of 1,574,300.

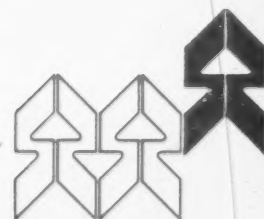
Of the two million plus Hispanic persons situated within the Los Angeles ADI, nearly 70% live within the Metropolitan Area (Los Angeles County).

As Table IIIA-2a shows, the overall ADI experienced a growth in Hispanic population of 87.5% from 1970 to 1980, with each individual county substantially growing during the 10 year period. Since 1960, the Hispanic population in the Los Angeles ADI has tripled in size.

**TABLE IIIA-2a**  
**LOS ANGELES ADI**

| Counties            | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|---------------------|-----------------------------------------|-----------------------------------------|
| Inyo                | 0.6                                     | 1.5                                     |
| Kern East           | 6.5                                     | 12.6                                    |
| Los Angeles         | 911.0                                   | 1,574.3                                 |
| Orange              | 105.6                                   | 266.8                                   |
| Riverside West      | 43.9                                    | 102.6                                   |
| San Bernardino West | 79.6                                    | 162.4                                   |
| Ventura             | 55.7                                    | 136.6                                   |
| <b>TOTAL</b>        | <b>1,202.9</b>                          | <b>2,256.8</b>                          |

Source: U. S. Bureau of the Census  
Strategy Research Corporation



By comparing total population growth with Hispanic population growth, the scope of the Los Angeles Latin segment is evident. While the Metro Hispanic population grew 73% from 1970 to 1980 (911,000 to 1,574,300), the total population grew only 4% (from 7,032,100 to 7,314,300). The growth patterns in Orange County are even more dramatic, with the total population increasing by 37% (1970 = 1,420,400, 1980 = 1,944,600), while the Hispanic population grew 153% (1970 = 105,600, 1980 = 266,800).

The size in sheer numbers of the Hispanic population residing in the Los Angeles ADI is quite impressive and comparisons prove interesting and put these statistics into perspective. For example, the Los Angeles ADI is one of the largest Hispanic markets in the world. Furthermore, these 1,574,300 Metro Hispanics alone would rank as the 21st largest metro area in the U.S., larger than the total population of such metros as Denver and Seattle.

In terms of language use, Los Angeles Hispanics have largely retained use of their native tongue, as nearly 60% speak Spanish most frequently in the household. About one-third speak both English and Spanish equally.

According to an article in the October 16, 1978 issue of *Time* magazine, the Chicano market strongly supports a California law which provides that "... students who speak little or no English should receive bilingual education if their parents want them to."

Thus, not only do Hispanics cling to their native tongue and culture in and of themselves, they are certainly being provided with the opportunity to continue using Spanish.

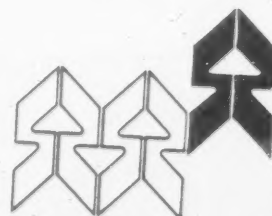
Table IIIA-2b shows the age and sex distribution of all Hispanics in Los Angeles ADI. Overall, the Hispanic population is quite young, with 41.3% being under the age of 18, and 71.3% under 35 years of age.

About 46.5% of the adult Hispanics are male, while 53.5% are female.

TABLE IIIA-2b  
LOS ANGELES ADI  
HISPANIC AGE/SEX DISTRIBUTION

|               | Population<br>(000) | Percent<br>Distribution<br>(%) |
|---------------|---------------------|--------------------------------|
| Males 18-34   | 318.2               | 14.1%                          |
| 35-49         | 173.8               | 7.7                            |
| 50-64         | 90.3                | 4.0                            |
| 65+           | 33.9                | 1.5                            |
| Females 18-34 | 358.8               | 15.9                           |
| 35-49         | 187.3               | 8.3                            |
| 50-64         | 106.1               | 4.7                            |
| 65+           | 56.4                | 2.5                            |
| Teens 12-17   | 277.6               | 12.3                           |
| Children 0-11 | 654.4               | 29.0                           |
| TOTAL         | 2,256.8             | 100.0%                         |

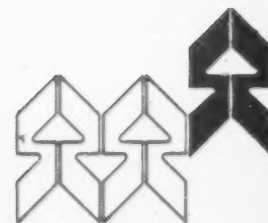
Source: Market Statistics Inc.  
Strategy Research Corporation





The most recent estimate of the family size of Hispanic versus non-Hispanic households shows an average of 3.5 persons per Hispanic home, compared with a non-Hispanic family size of 2.5 persons. This is consistent with national trends.

Mexicans comprise the single largest group of Hispanics in the Los Angeles market, representing 59.2% of all Hispanics in this area.



## **ADI-3**

# **San Antonio**

The current estimate of the Hispanic population in the San Antonio ADI is 849,600, with a total of 599,300 of these living in Bexar County. This represents a concentration of 70.5% of the Hispanics in the San Antonio ADI living in Bexar County. The remaining 250,300 Hispanics (representing 29.5% of the total Hispanic market in San Antonio) reside in the remaining 27 counties within the San Antonio ADI.

Spanish speaking persons are not a minority segment in this market, as 59% of the ADI populus is Hispanic (849,600 Hispanic and 1,448,800 total persons).

Overall, the Hispanic population in the San Antonio ADI more than doubled between 1970 and 1980, from 424,200 in 1970 to the current estimate of nearly 850,000.

Bexar County alone showed an absolute growth of 292,400 Hispanic persons, or a 95.3% increase during the 10 year period. In the same period, total population of Bexar rose 23%, from 830,500 in 1970 to 1,017,900 in 1980.

Over half of the San Antonio Hispanic population speaks both English and Spanish with a significant 28% speaking their native tongue most frequently at home. Thus, we see a more widespread use of the English language among Hispanics in the San Antonio ADI as compared with other major Hispanic markets.

There is quite a bit of permanency evident in the San Antonio Hispanic community: 43.3% have resided in the market more than 20 years, and over half have been living in the San Antonio area for more than 15 years.

Due to larger family size and higher consumption levels, Hispanics spend significant amounts on food items. The average Hispanic family living in San Antonio spends about \$51.60 per week on groceries.

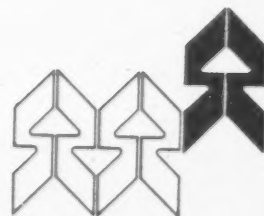
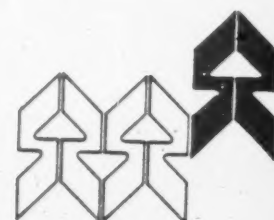


TABLE IIIA-3a  
SAN ANTONIO ADI<sup>o</sup>

| Counties  | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|-----------|-----------------------------------------|-----------------------------------------|
| Atascosa  | 3.0                                     | 14.0                                    |
| Bandera   | 0.3                                     | 0.9                                     |
| Bexar     | 306.9                                   | 599.3                                   |
| Comal     | 6.0                                     | 13.8                                    |
| De Witt   | 3.3                                     | 7.2                                     |
| Dimmit    | 6.7                                     | 13.5                                    |
| Edwards   | 0.9                                     | 2.1                                     |
| Frio      | 6.2                                     | 13.8                                    |
| Gillespie | 0.9                                     | 2.1                                     |
| Goliad    | 1.6                                     | 3.4                                     |
| Gonzales  | 3.9                                     | 7.1                                     |
| Guadalupe | 7.7                                     | 17.0                                    |
| Karnes    | 4.7                                     | 8.2                                     |
| Kendall   | 1.2                                     | 3.1                                     |
| Kerr      | 1.8                                     | 5.7                                     |
| Kimble    | 0.6                                     | 1.7                                     |
| Kinney    | 1.0                                     | 3.1                                     |
| LaSalle   | 3.5                                     | 7.2                                     |
| Lavaca    | 0.9                                     | 1.5                                     |
| Live Oak  | 2.4                                     | 4.9                                     |
| McMullen  | 0.3                                     | 0.8                                     |
| Maverick  | 13.8                                    | 32.9                                    |
| Medina    | 8.2                                     | 17.6                                    |
| Real      | 0.4                                     | 0.9                                     |
| Uvalde    | 7.2                                     | 15.1                                    |
| Val Verde | 13.0                                    | 28.5                                    |
| Wilson    | 4.5                                     | 9.6                                     |
| Zavala    | 8.3                                     | 14.6                                    |
| TOTAL     | 424.2                                   | 849.6                                   |

Source: U. S. Bureau of the Census  
Strategy Research Corporation



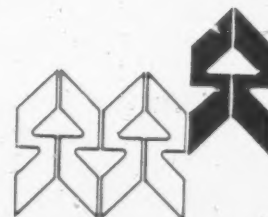
In terms of the age characteristics of the San Antonio Hispanic market, 43.4% are under 18 years of age, with a total of 69.4% under the age of 35.

Table IIIA-3b shows the age and sex distribution of all Hispanics located within the San Antonio ADI.

| TABLE IIIA-3b                                                    |                     |                                |
|------------------------------------------------------------------|---------------------|--------------------------------|
| SAN ANTONIO ADI<br>HISPANIC AGE/SEX DISTRIBUTION                 |                     |                                |
|                                                                  | Population<br>(000) | Percent<br>Distribution<br>(%) |
| Males 18-34                                                      | 101.8               | 12.0%                          |
| 35-49                                                            | 53.5                | 6.3                            |
| 50-64                                                            | 40.8                | 4.8                            |
| 65+                                                              | 21.2                | 2.5                            |
| Females 18-34                                                    | 118.7               | 14.0                           |
| 35-49                                                            | 66.7                | 7.8                            |
| 50-64                                                            | 49.2                | 5.8                            |
| 65+                                                              | 29.7                | 3.5                            |
| Teens 12-17                                                      | 117.2               | 13.8                           |
| Children 0-11                                                    | 251.3               | 29.6                           |
| TOTAL                                                            | 849.6               | 100.0%                         |
| Source: Market Statistics, Inc.<br>Strategy Research Corporation |                     |                                |

Nearly 55% of the Hispanics 18 years of age and older are female, compared with 45% adult males. On an average, Spanish households in San Antonio contain 3.6 persons, compared to 2.9 persons per non-Spanish household. These persons per household figures are based upon a survey conducted by Strategy Research Corporation in 1979.

San Antonio's Latin residents are predominately of Mexican origin. As the area was originally explored and settled by the Spanish, it has a rich Latin culture and heritage (as mentioned earlier, Mexico relinquished rights to Texas only 134 years ago—in 1848).



## ADI-4

### Miami

The Miami ADI is currently the home of 767,400 Hispanics, with 86.1% of these living in Dade County. Overall, the number of Hispanic persons residing in the three-county Miami ADI increased from 322,500 in 1970 to 767,400 in 1980, a growth of nearly 138%. Dade County now boasts a Hispanic population of 661,400, a 121% increase over the 1970 figure of 299,200.

The remaining 13.9% of the Miami ADI's Hispanic population reside in Broward and Monroe Counties, and the growth of the Broward County Hispanic market has been tremendous—from 15,500 in 1970 to 92,700 in 1980 (an increase of 498%).

TABLE IIIA-4a

#### MIAMI ADI

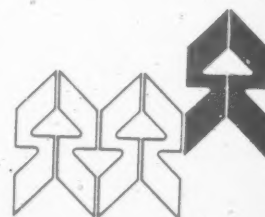
| Counties                                                            | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|---------------------------------------------------------------------|-----------------------------------------|-----------------------------------------|
| Broward                                                             | 15.5                                    | 92.7                                    |
| Dade                                                                | 299.2                                   | 661.4                                   |
| Monroe                                                              | 7.8                                     | 13.3                                    |
| <b>TOTAL</b>                                                        | <b>322.5</b>                            | <b>767.4</b>                            |
| Source: U. S. Bureau of the Census<br>Strategy Research Corporation |                                         |                                         |

The Latin market in the Miami ADI is a large market, and continues to grow as a result of natural increase (births over deaths) and new in-migration.

As of September 1978, one out of 20 Hispanics heads of household had moved into Dade County within the previous year.

In-migration is made up partly by resettled Cubans returning to Miami, as well as by increasing arrivals of Dominicans, Colombians, Venezuelans and others from Central and South America.

Following the national trend, family size is diminishing among the Miami Hispanic community. As of September 1978, the average number of persons per household had dropped to 3.40 from 3.83 as of September 1975 and 3.91 in April 1974. Also, more family members are working than did so previously. Households with two or more family members employed increased from 28.6% in September 1975 to 37.6% in September 1978.





Educational levels continue to rise. The median number of school years completed is 11.3, up from 11.1 years in September 1975. Almost one-third of the Hispanic heads of household now have some college background.

Probably the most dramatic evidence of well-being in the Latin community in Dade County has been the surge in family income, which grew from an average of \$10,320 in September 1975 to \$13,644 in September 1978. The aggregate annual income of the Latin community in Dade County alone is better than \$2.2 billion. This 1978 income figure (\$13,644) is, no doubt, much higher today and is substantially higher than the median family income estimate for the total U.S. Hispanic market (1980 estimate = \$12,952).

Almost two out of three Hispanic household members have credit cards, a sign of healthy incomes and credit ratings.

Still more evidence of progress among Miami Hispanics is the fact that almost two out of three families (61.4%) own their own home.

In spite of signs of increasing assimilation into the American economy, the Latin life-style resists conversion in many areas. In more than eight out of ten Latin households in Dade County, Spanish continues to be the most predominant language spoken.

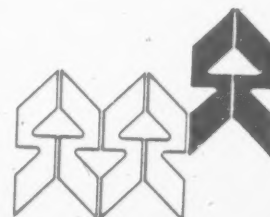
In terms of the age distribution of the Hispanic market in the Miami ADI, slightly less than 30% are under 18 years of age, while 53.7% are under the age of 35. Median age for the Miami Hispanic population is considerably higher than the national estimates—31.4 years among Miami's Latins versus 22.1 for the entire U.S. Hispanic market.

TABLE IIIA-14b

**SAN DIEGO ADI  
HISPANIC AGE/SEX DISTRIBUTION**

|                        | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|------------------------|---------------------------------|--------------------------------|
| <b>Maies 18 - 34</b>   | 46.1                            | 16.5 %                         |
| 35 - 49                | 19.8                            | 7.1                            |
| 50 - 64                | 10.9                            | 3.9                            |
| 65+                    | 3.6                             | 1.3                            |
| <b>Females 18 - 34</b> | 39.0                            | 14.0                           |
| 35 - 49                | 24.0                            | 8.6                            |
| 50 - 64                | 11.7                            | 4.2                            |
| 65+                    | 6.1                             | 2.2                            |
| <b>Teens 12 - 17</b>   | 37.5                            | 13.5                           |
| <b>Children 0 - 11</b> | 79.9                            | 28.7                           |
| <b>TOTAL</b>           | 278.6                           | 100.0 %                        |

Source: Market Statistics, Inc.  
Strategy Research Corporation



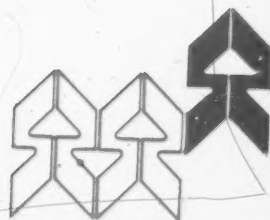
Hispanic families are spending more on groceries. Average weekly expenditure for food increased from \$64.10 in September 1975 to \$67.28 in September 1978. The proportion spending \$80.00 or more a week went from 19.3% to 26.6% in that same period.

Hispanic families spend considerably more on groceries per family than do Anglo families. In September 1975, for example, the average weekly expenditure of the Anglo family in Dade County was \$42.39; the Hispanic family spent \$64.10. This is partially the result of the fact that Latin families are larger, and partially because they tend to spend less of their income on non-essential or luxury items or services.

Shopping patterns among Miami Latins reflect a preference for stores offering acceptable products at fair prices and a marked preference for stores expressing a desire to do business with Latins—regardless of nationality of the ownership. Shopping patterns are influenced by this sense of feeling culturally welcome. In most retail categories, a majority of Latins shop at "American" stores and purchase "American" products—again, if the store and the product manufacturer has made them feel welcome.

For most grocery products, the preference is for "American" outlets. However, when purchasing meat, the opposite is true, probably reflecting the availability in Latin outlets of particular types and cuts of meat unique to Cuban cuisine and which are not available in "American" outlets. This is one more evidence of continuing adherence to the Latin life-style and the necessity to recognize this in any marketing efforts directed at this community.

Further indication of this is evident when department store patronage is analyzed. More than half the reasons given for shopping in a specific store involve the ability on the part of the store and its personnel to communicate in Spanish and to offer merchandise compatible with Latin tastes.



## ADI-5

### San Francisco

The San Francisco ADI has an estimated 705,800 Hispanic persons, an increase of 343,000 persons, or 94.5%, from 1970. Hispanics in the San Francisco market are not as geographically concentrated as are Latins in other markets. The largest Hispanic population resides in Santa Clara County, where 272,500 Hispanics live, or 38.6% of the total. Santa Clara is the home county (and Metro Area) of the city of San Jose.

There are an estimated 133,100 Hispanic persons residing in Alameda County, representing 18.9% of the total Hispanics in the ADI. Alameda County encompasses the city of Oakland.

Finally, San Francisco County contains 14.6% of the total Hispanics in the ADI, or 103,300 persons. Even these three counties combined constitute less than three quarters of all Hispanics in the San Francisco market, as San Mateo and Contra Costa West Counties contain a sizable number of Hispanic residents; with somewhat fewer numbers in Sonoma, Marin and Solano West.

While the Spanish population of the ADI was almost doubling from 1970 to 1980, the total population grew only 12% (from 4,530,900 in 1970 to 5,059,700 in 1980). In fact, typical of many major cities, the total population of the city of San Francisco (same as San Francisco County) actually declined 7%—from 715,700 persons in 1970 to 663,200 persons in 1980—while the Hispanic population of the city roughly doubled.

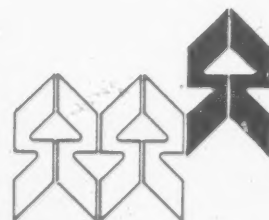
Overall, the Hispanic population penetration of the San Francisco ADI is 13.9%—705,800 Hispanics and 5,059,700 total population. However, Latins comprise 16.5% of the population of the three major city/counties—Alameda, San Francisco and Santa Clara—with an Hispanic total of 508,900 and a total population of 3,084,900.

Table IIIA-5a shows the Hispanic population in the San Francisco ADI, by county, for 1970 and 1980.

TABLE IIIA-5a  
SAN FRANCISCO ADI

| Counties          | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|-------------------|-----------------------------------------|-----------------------------------------|
| Alameda           | 88.9                                    | 133.1                                   |
| Contra Costa West | 27.6                                    | 54.7                                    |
| Lake              | 0.6                                     | 1.8                                     |
| Marin             | 6.3                                     | 15.9                                    |
| Mendocino         | 1.8                                     | 3.1                                     |
| Napa              | 4.0                                     | 7.4                                     |
| San Francisco     | 55.1                                    | 103.3                                   |
| San Mateo         | 34.2                                    | 73.8                                    |
| Santa Clara       | 129.8                                   | 272.5                                   |
| Solano West       | 5.0                                     | 14.4                                    |
| Sonoma            | 9.5                                     | 25.8                                    |
| TOTAL             | 362.8                                   | 705.8                                   |

Source: U. S. Bureau of the Census  
Strategy Research Corporation



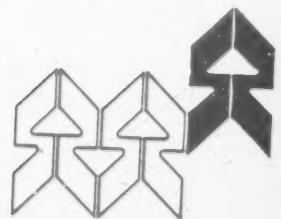
As is shown on Table IIIA-5b, 38.3% of the Hispanics in this market are under 18 years of age, while 68.6% are under 35 years.

**TABLE III-5b**  
**SAN FRANCISCO ADI**  
**HISPANIC AGE/SEX DISTRIBUTION**

|               | Population<br>(000) | Percent<br>Distribution<br>(%) |
|---------------|---------------------|--------------------------------|
| Males 18-34   | 103.0               | 14.6%                          |
| 35-49         | 56.5                | 8.0                            |
| 50-64         | 33.9                | 4.8                            |
| 65+           | 12.0                | 1.7                            |
| Females 18-34 | 110.8               | 15.7                           |
| 35-49         | 60.7                | 8.6                            |
| 50-64         | 37.4                | 5.3                            |
| 65+           | 21.2                | 3.0                            |
| Teens 12-17   | 87.5                | 12.4                           |
| Children 0-11 | 182.8               | 25.9                           |
| <b>TOTAL</b>  | <b>705.8</b>        | <b>100.0%</b>                  |

Source: Market Statistics, Inc.  
Strategy Research Corporation

Slightly more than 47% of the adult Hispanics are male, while nearly 53% are female. Over one-quarter are children 11 years or younger.



# ADI-6

## Chicago

The Chicago ADI is the sixth ranking Hispanic market in the U.S.; however, this statistic is a bit misleading as the urban concentration of Latins within the Chicago ADI is dramatic. Cook County, which includes the City of Chicago, is the fourth largest Hispanic county in the nation with 523,700 Spanish-speaking persons (surpassed only by Los Angeles County, California, Dade County, Florida, and Bexar County, Texas). The Chicago six county metropolitan area contains 581,500 Hispanics (88% of the Hispanic ADI total), and the eight county consolidated statistical area (which includes the Gary, Indiana metro area) contains 632,400 Latins, or 97% of the Hispanic population in the Chicago ADI.

It has been estimated that there were 110,000 Spanish-speaking residents of the City of Chicago in 1960. The 1970 figure was 247,300, representing a 125% increase. From 1970 to 1980 the Hispanic population for all of Cook County grew 83%; from 255,600 in 1970 to 523,700 in 1980. In this same ten year span ('70 to '80), the total population of Cook County actually declined by 2.5% from 5.49 million to 5.35 million.

The Chicago Hispanic community differs from other major Latin markets in that no one origin group dominates. It contains a truly heterogeneous mix of Mexicans, Puerto Ricans and other Spanish sub groups. The 1970 census showed Mexicans to be the leading origin group, comprising 43% of the city's Spanish-speaking population. More recent estimates indicate that the Puerto Rican origin group may now surpass the Mexican populus. As well, there are sizable Cuban and Central and South American communities. Because of this mixture of Latin origin groups, Chicago has become a popular test market for marketers and advertisers interested in the Hispanic market.

TABLE IIIA-6a

### CHICAGO ADI

| Counties           | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|--------------------|-----------------------------------------|-----------------------------------------|
| Cook, Illinois     | 285.6                                   | 523.7                                   |
| DeKalb             | 0.8                                     | 1.3                                     |
| DuPage             | 6.9                                     | 16.2                                    |
| Grundy             | 0.2                                     | 0.6                                     |
| Iroquois           | 0.1                                     | 0.3                                     |
| Kane               | 11.6                                    | 19.4                                    |
| Kankakee           | 0.8                                     | 1.4                                     |
| Kendall            | 0.3                                     | 0.8                                     |
| Lake               | 11.1                                    | 18.8                                    |
| LaSalle            | 1.5                                     | 2.9                                     |
| Livingston         | 0.2                                     | 0.6                                     |
| McHenry            | 1.5                                     | 3.4                                     |
| Will               | 7.2                                     | 14.9                                    |
| Jasper, Indiana    | 0.5                                     | 0.6                                     |
| Lake               | 35.5                                    | 49.2                                    |
| La Porte           | 0.6                                     | 0.7                                     |
| Newton             | 0.1                                     | 0.1                                     |
| Porter             | 1.1                                     | 1.7                                     |
| Kenosha, Wisconsin | 2.7                                     | 3.5                                     |
| <b>TOTAL</b>       | <b>368.3</b>                            | <b>660.1</b>                            |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

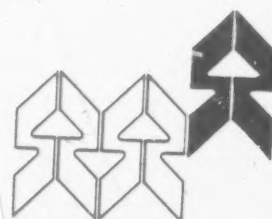




Table IIIA-6a gives the county-by-county Hispanic population of the Chicago ADI for 1970 and 1980. The Chicago ADI is home to a very young Hispanic population. Under 30% of the Chicago Hispanic population is less than 12 years of age. Table IIIA-6b provides the full Age/Sex distribution.

TABLE IIIA-6b

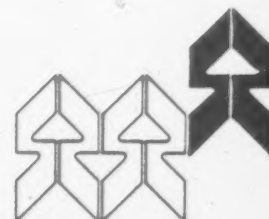
**CHICAGO ADI  
HISPANIC AGE/SEX DISTRIBUTION**

|                      | Population<br>(000) | Percent<br>Distribution<br>(%) |
|----------------------|---------------------|--------------------------------|
| <b>Males 18-34</b>   | 101.0               | 15.3%                          |
| 35-49                | 54.1                | 8.2                            |
| 50-64                | 21.1                | 3.2                            |
| 65+                  | 7.3                 | 1.1                            |
| <b>Females 18-34</b> | 107.6               | 16.3                           |
| 35-49                | 50.8                | 7.7                            |
| 50-64                | 21.1                | 3.2                            |
| 65+                  | 8.6                 | 1.3                            |
| <b>Teens 12-17</b>   | 81.9                | 12.4                           |
| <b>Children 0-11</b> | 206.6               | 31.3                           |
| <b>TOTAL</b>         | 660.1               | 100.0%                         |

Source: Market Statistics, Inc.  
Strategy Research Corporation

For a number of years now there has been a controversy concerning the number of undocumented Hispanics in Chicago. In 1975, the Department of U.S. Immigration and Naturalization estimated that there were perhaps as many as 500,000 Spanish "illegals" in the Chicago area. Such controversy is typical of agricultural locales in California and the Southwest, but is more unusual for an industrial city such as Chicago.

Also typical of many Southwest and California markets is the growth of the "bilingual city" concept. With such a sizable Latin population, Chicago has been moving in this direction. Signs of this trend are evident in that the Transit Authority Transfer Slips appear in two languages, a number of the local museums employ bilingual tour guides, telephone directories are in two languages and Bell Telephone also gives employment exams in Spanish.



# ADI-7

## McAllen/Brownsville

The total Hispanic population of the McAllen-Brownsville ADI is currently estimated at 533,800, an increase of 118.3% over the 1970 estimate of 244,500.

Over 90% of the Hispanic population in this market is concentrated in Cameron and Hidalgo Counties, both of which have shown tremendous growth in terms of Hispanic population since 1970. Cameron County currently boasts a Hispanic market of 209,600 persons, an increase of 129.8% over the 1970 figure.

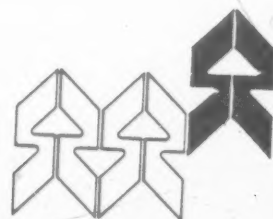
Hidalgo County, with a Hispanic population of 274,300, has shown a growth of over 115% since 1970. Table IIIA-7a shows the county by county breakdown of Hispanic population for 1970 and 1980 in the McAllen-Brownsville ADI.

TABLE IIIA-7a  
McALLEN-BROWNSVILLE ADI

| Counties | 1970                            | 1980                            |
|----------|---------------------------------|---------------------------------|
|          | Hispanic<br>Population<br>(000) | Hispanic<br>Population<br>(000) |
| Cameron  | 91.2                            | 209.6                           |
| Hidalgo  | 127.5                           | 274.3                           |
| Starr    | 15.1                            | 29.9                            |
| Willacy  | 10.7                            | 20.0                            |
| TOTAL    | 244.5                           | 533.8                           |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

Similar to a number of Texas markets, a majority of the population of the McAllen-Brownsville ADI is Hispanic. In fact, Hispanic population penetration approaches saturation as 92% of the residents are Latin (total population-580,700 and Hispanic population-533,800). The only major Hispanic ADI with a greater ratio of Hispanic to non-Hispanic persons is Laredo, Texas, where 94% of the ADI population is Spanish.



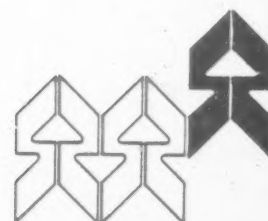
The McAllen-Brownsville Hispanic market is considered young; referring to Table IIIA-7b, we see that 42.6% are under 18 years of age, while 67.1% are under the age of 35.

**TABLE IIIA-7b**  
**McALLEN-BROWNSVILLE ADI**  
**HISPANIC AGE/SEX DISTRIBUTION**

|                      | Population<br>(000) | Percent<br>Distribution<br>(%) |
|----------------------|---------------------|--------------------------------|
| <b>Males 18-34</b>   | 59.8                | 11.2%                          |
| 35-49                | 33.6                | 6.3                            |
| 50-64                | 24.6                | 4.6                            |
| 65+                  | 17.1                | 3.2                            |
| <b>Females 18-34</b> | 71.0                | 13.3                           |
| 35-49                | 42.2                | 7.9                            |
| 50-64                | 31.5                | 5.9                            |
| 65+                  | 26.7                | 5.0                            |
| <b>Teens 12-17</b>   | 72.6                | 13.6                           |
| <b>Children 0-11</b> | 154.7               | 29.0                           |
| <b>TOTAL</b>         | <b>533.8</b>        | <b>100.0%</b>                  |

Source: Market Statistics, Inc.  
Strategy Research Corporation

Directly across the Rio Grande River, immediately adjacent to Brownsville, is Matamoros, Mexico. The Matamoros market is estimated as having a population of more than 45,000 Hispanics. Many of these Mexican citizens work and shop on the U.S. side of the border and, in reality, all are part of the McAllen-Brownsville media coverage area.



# ADI-8

## El Paso

The El Paso ADI is comprised of 474,300 Hispanic persons, 389,700 of which are located in El Paso County. This represents 82.2% concentration of the ADI's Hispanic population residing in El Paso County — which conforms with the Metropolitan Area definition. Nationally, 82.5% of Hispanics live inside Metropolitan areas, so this Metro/non-Metro ratio is consistent with the national trend.

Since 1970, the El Paso ADI has grown by a total of 269,900 Hispanic persons or by 132%. El Paso County itself more than doubled its Hispanic population in the period from 1970 to 1980, from 161,800 to 389,700. This represents an increase of nearly 141% over the ten year period.

Table IIIA-8a shows the county by county Hispanic population in the El Paso ADI, for 1970 and 1980.

**TABLE IIIA-8a**  
**EL PASO ADI**

| Counties             | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|----------------------|-----------------------------------------|-----------------------------------------|
| El Paso, Texas       | 161.8                                   | 389.7                                   |
| Hudspeth             | 1.3                                     | 2.9                                     |
| Dona Ana, New Mexico | 30.4                                    | 58.8                                    |
| Luna                 | 4.2                                     | 9.5                                     |
| Otero                | 6.7                                     | 13.4                                    |
| <b>TOTAL</b>         | <b>204.4</b>                            | <b>474.3</b>                            |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

Of all Hispanics in the El Paso ADI, 46.6% are under 18 years of age, while 71.4% are less than 35 years old. This is a relatively young Hispanic market, with a median age of 19.3 years.

Table IIIA-8b shows the specific age/sex distribution of the Hispanic population residing within the El Paso ADI.

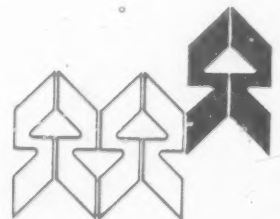


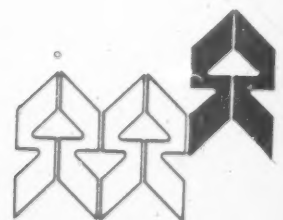
**TABLE IIIA-8b**  
**EL PASO ADI**  
**HISPANIC AGE/SEX DISTRIBUTION**

|                      | Population<br>(000) | Percent<br>Distribution<br>(%) |
|----------------------|---------------------|--------------------------------|
| <b>Males 18-34</b>   | 52.5                | 11.1%                          |
| 35-49                | 31.2                | 6.6                            |
| 50-64                | 18.5                | 3.9                            |
| 65+                  | 8.1                 | 1.7                            |
| <b>Females 18-34</b> | 65.0                | 13.7                           |
| 35-49                | 40.8                | 8.6                            |
| 50-64                | 23.2                | 4.9                            |
| 65+                  | 14.2                | 3.0                            |
| <b>Teens 12-17</b>   | 69.1                | 14.6                           |
| <b>Children 0-11</b> | 151.7               | 32.0                           |
| <b>TOTAL</b>         | <b>474.3</b>        | <b>100.0%</b>                  |

Source: Market Statistics, Inc.  
Strategy Research Corporation

While the Hispanic population of the El Paso Metro grew 141% from 1970 to 1980, the non-Hispanic population decreased 43% from 197,500 persons in 1970 to 113,400 in 1980. Currently, 78% of the metro population is Hispanic (389,700 Latins and 503,100 total persons). With 663,000 total population and 474,300 Hispanic population, the El Paso ADI is 72% Hispanic.

Lying on the Rio Grande River, El Paso is adjacent to Ciudad Juarez, Mexico. The Juarez market is estimated to have more than 600,000 residents; thus, in effect, more than doubling the size of the El Paso Hispanic market.





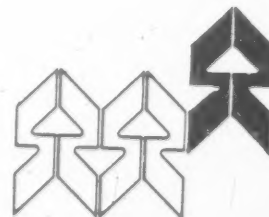
# ADI-9

## Albuquerque

TABLE IIIA-9a  
ALBUQUERQUE ADI

| Counties               | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|------------------------|-----------------------------------------|-----------------------------------------|
| Apache North, Arizona  | 1.2                                     | 3.0                                     |
| Alamosa, Colorado      | 3.0                                     | 4.7                                     |
| Archuleta              | 1.0                                     | 3.0                                     |
| Conejos                | 4.2                                     | 6.4                                     |
| Costilla               | 1.8                                     | 3.0                                     |
| Dolores                | 0.0                                     | 0.0                                     |
| La Plata               | 2.5                                     | 5.8                                     |
| Montezuma              | 1.1                                     | 2.7                                     |
| Rio Grande             | 3.1                                     | 5.4                                     |
| Saguache               | 1.4                                     | 1.9                                     |
| Bernalillo, New Mexico | 91.9                                    | 186.1                                   |
| Colfax                 | 5.5                                     | 9.5                                     |
| Grant                  | 10.3                                    | 18.9                                    |
| Guadalupe              | 3.5                                     | 4.4                                     |
| Harding                | 0.6                                     | 0.7                                     |
| Lincoln                | 2.0                                     | 4.9                                     |
| Los Alamos             | 1.6                                     | 4.7                                     |
| McKinley               | 4.3                                     | 12.0                                    |
| Mora                   | 3.3                                     | 4.7                                     |
| Rio Arriba             | 16.6                                    | 26.2                                    |
| Sandoval               | 5.3                                     | 11.2                                    |
| San Miguel             | 13.6                                    | 23.8                                    |
| Santa Fe               | 27.0                                    | 51.2                                    |
| Sierra                 | 1.9                                     | 3.9                                     |
| Socorro                | 4.5                                     | 8.3                                     |
| San Miguel             | 12.1                                    | 20.0                                    |
| Torrance               | 2.3                                     | 4.3                                     |
| Valencia               | 16.6                                    | 34.9                                    |
| TOTAL                  | 242.2                                   | 465.6                                   |

Source: U. S. Bureau of the Census  
Strategy Research Corporation



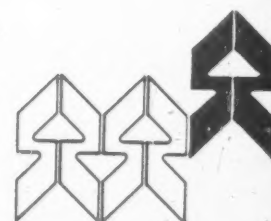
In terms of percent distribution, Albuquerque ranks as one of the leading Hispanic markets in the U.S. The metropolitan area (Bernalillo and Sandoval Counties), is 44% Latin, with 197,300 Hispanics and 451,800 total persons. From 1970 to 1980 the total population of the Albuquerque metro increased a substantial 35%. However, in this same 10 year period, the Spanish population doubled, from 97,200 to 197,300. This rapid rate of growth will most likely continue in the future as almost 70% of the Hispanic population is under 35 years of age.

**TABLE IIIA-9b**  
**ALBUQUERQUE ADI**  
**HISPANIC AGE/SEX DISTRIBUTION**

|                      | Population<br>(000) | Percent<br>Distribution<br>(%) |
|----------------------|---------------------|--------------------------------|
| <b>Males 18-34</b>   | 55.4                | 11.9%                          |
| 35-49                | 29.3                | 6.3                            |
| 50-64                | 23.7                | 5.1                            |
| 65+                  | 11.6                | 2.5                            |
| <b>Females 18-34</b> | 64.7                | 13.9                           |
| 35-49                | 35.4                | 7.6                            |
| 50-64                | 27.0                | 5.8                            |
| 65+                  | 16.3                | 3.5                            |
| <b>Teens 12-17</b>   | 67.1                | 14.4                           |
| <b>Children 0-11</b> | 135.1               | 29.0                           |
| <b>TOTAL</b>         | 465.6               | 100.0%                         |

Source: Market Statistics, Inc.  
Strategy Research Corporation

Unlike many of the major markets, the Latin populus of the Albuquerque ADI is not overwhelmingly concentrated in the city or metro area. With large numbers in Rio Arriba, San Miguel, Santa Fe, Tatos and Valencia Counties, 58% of the ADI Latins reside outside the Albuquerque metro.



# ADI-10

## Houston

Houston is the tenth largest Hispanic ADI in the United States. The 1980 estimate of Hispanics living in the Houston ADI is nearly two and a half times larger than the 1970 Hispanic population. Specifically, the number of Hispanics in this market increased from 191,500 in 1970 to the current level of 459,400, a growth of 140% for the 10 year period.

**TABLE IIIA-10a**  
**HOUSTON ADI**

| Counties     | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|--------------|-----------------------------------------|-----------------------------------------|
| Austin       | 0.3                                     | 0.6                                     |
| Brazoria     | 8.3                                     | 19.7                                    |
| Calhoun      | 4.9                                     | 9.6                                     |
| Chambers     | 0.3                                     | 0.8                                     |
| Colorado     | 1.5                                     | 2.8                                     |
| Fort Bend    | 11.8                                    | 34.3                                    |
| Galveston    | 14.3                                    | 34.6                                    |
| Grimes       | 0.7                                     | 1.7                                     |
| Harris       | 134.9                                   | 320.2                                   |
| Jackson      | 1.8                                     | 4.4                                     |
| Liberty      | 0.1                                     | 0.6                                     |
| Matagorda    | 4.3                                     | 9.8                                     |
| Montgomery   | 1.0                                     | 4.8                                     |
| Polk         | 0.2                                     | 0.6                                     |
| San Jacinto  | 0.1                                     | 0.2                                     |
| Trinity      | 0.0                                     | 0.2                                     |
| Walker       | 1.0                                     | 2.6                                     |
| Waller       | 0.2                                     | 0.6                                     |
| Washington   | 0.2                                     | 0.3                                     |
| Wharton      | 5.6                                     | 11.0                                    |
| <b>TOTAL</b> | <b>191.5</b>                            | <b>459.4</b>                            |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

Harris county, home county for the city of Houston, has the greatest concentration, with 69.7% of all Hispanics in the ADI residing in this county. There are currently 320,200 Hispanics in Harris County, an increase of 185,300 persons, or 137.4%, since 1970.

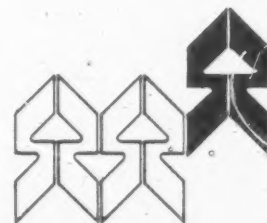
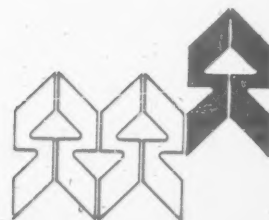


**TABLE IIIA-10b**  
**HOUSTON ADI**  
**HISPANIC AGE/SEX DISTRIBUTION**

|               | Population<br>(000) | Percent<br>Distribution<br>(%) |
|---------------|---------------------|--------------------------------|
| Males 18-34   | 66.6                | 14.5%                          |
| 35-49         | 30.3                | 6.6                            |
| 50-64         | 17.0                | 3.7                            |
| 65+           | 5.5                 | 1.2                            |
| Females 18-34 | 68.0                | 14.8                           |
| 35-49         | 34.0                | 7.4                            |
| 50-64         | 16.1                | 3.5                            |
| 65+           | 6.9                 | 1.5                            |
| Teens 12-17   | 62.5                | 13.6                           |
| Children 0-11 | 152.5               | 33.2                           |
| <b>TOTAL</b>  | <b>459.4</b>        | <b>100.0%</b>                  |

Source: Market Statistics, Inc.  
 Strategy Research Corporation

Eighty-three percent of the Hispanic ADI population live with the Houston six county Metropolitan Area. Even though the overall area has seen rapid growth, the Latin population has grown four times faster. From 1970 to 1980 the Metro population grew 37% (from 1,999,300 in 1970 to 2,736,000 in 1980), while the Hispanic population grew 143% (from 156,300 in 1970 to 380,200 in 1980). Based on these estimates, the Houston Metro population is currently 14% Hispanic.



# ADI-11

## Phoenix

As of 1980, the Hispanic population residing in the Phoenix ADI totaled 311,600 persons, an increase of 173,000 persons or 125%, since 1970.

A total of 227,500 of these Hispanics are located in Maricopa County, (the Phoenix Metro Area), representing 73% of the total Hispanic ADI.

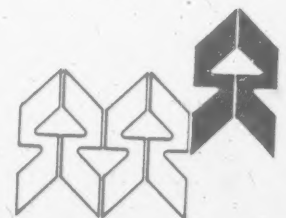
Table IIIA-11a shows the level of Hispanic population in each county of the Phoenix ADI, for 1970 and 1980. All counties in the market experienced an increase in the number of Hispanics over the ten year period.

**TABLE IIIA-11a**  
**PHOENIX ADI**

| Counties                   | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|----------------------------|-----------------------------------------|-----------------------------------------|
| Gila, Arizona              | 5.9                                     | 12.1                                    |
| Greenlee                   | 3.4                                     | 6.8                                     |
| Maricopa                   | 100.9                                   | 227.5                                   |
| Mojave                     | 0.9                                     | 3.8                                     |
| Navajo                     | 3.2                                     | 8.5                                     |
| Pinal                      | 18.6                                    | 38.1                                    |
| Yavapai                    | 2.8                                     | 8.4                                     |
| Riverside East, California | 2.1                                     | 4.9                                     |
| San Bernardino East        | 0.8                                     | 1.5                                     |
| <b>TOTAL</b>               | <b>138.6</b>                            | <b>311.6</b>                            |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

In terms of the age and sex profile of the Hispanic population in this market, Table IIIA-11b shows 47.6% to be under the age of 18, while nearly three-quarters are under 35 years of age.

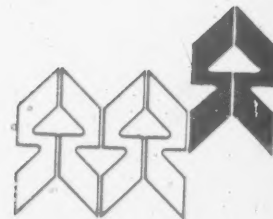


Since 1970, Maricopa County has seen its Hispanic population more than double, from 100,900 in 1970 to the current level of 227,500 persons. This is a growth of 125.5% over the ten year period for the Phoenix Metro. In this same ten year period the total Metro population increased 46%, from 967,500 persons in 1970 to 1,414,300 today.

**TABLE IIIA-11b**  
**PHOENIX ADI**  
**HISPANIC AGE/SEX DISTRIBUTION**

|                        | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|------------------------|---------------------------------|--------------------------------|
| <b>Males 18 - 34</b>   | 40.0                            | 12.8 %                         |
| 35 - 49                | 19.0                            | 6.1                            |
| 50 - 64                | 12.5                            | 4.0                            |
| 65+                    | 5.3                             | 1.7                            |
| <b>Females 18 - 34</b> | 44.9                            | 14.4                           |
| 35 - 49                | 21.5                            | 6.9                            |
| 50 - 64                | 13.7                            | 4.4                            |
| 65+                    | 6.5                             | 2.1                            |
| <b>Teens 12 - 17</b>   | 43.9                            | 14.1                           |
| <b>Children 0 - 11</b> | 104.3                           | 33.5                           |
| <b>TOTAL</b>           | <b>311.6</b>                    | <b>100.0 %</b>                 |

Source: Market Statistics, Inc.  
Strategy Research Corporation





# ADI-12

## Fresno

The total number of Hispanics currently residing within the Fresno ADI equals 298,600, up from a level of 166,000 in 1970. This represents a growth of nearly 80% over the ten year period, 1970-1980. In this same ten year period the total ADI population grew 24%, from 818,100 in 1970 to 1,015,100 in 1980.

Over one-quarter of the Fresno market's total Hispanic population is located in Tulare County, which boasts a total of 78,600 Hispanic persons, nearly double the level of 40,800 found in 1970.

With 1,015,100 total persons and 298,600 Hispanics, the Fresno ADI population is currently 29% Hispanic. Table IIIA-12a shows the Hispanic population in the ADI counties, for 1970 and 1980.

TABLE IIIA-12a

### FRESNO ADI

| Counties     | 1970                            | 1980                            |
|--------------|---------------------------------|---------------------------------|
|              | Hispanic<br>Population<br>(000) | Hispanic<br>Population<br>(000) |
| Fresno       | 84.8                            | 150.0                           |
| Kings        | 12.8                            | 19.7                            |
| Madera       | 8.1                             | 17.3                            |
| Mariposa     | 0.7                             | 0.3                             |
| Merced       | 18.8                            | 32.7                            |
| Tulare       | 40.8                            | 78.6                            |
| <b>TOTAL</b> | <b>166.0</b>                    | <b>298.6</b>                    |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

The Hispanics in the Fresno ADI are quite young; 47% are under 18, while nearly 74% are less than 35 years of age.

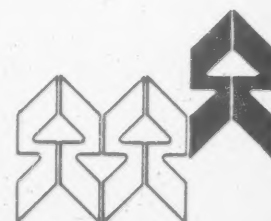


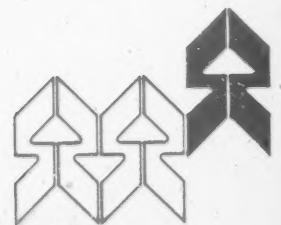
TABLE IIIA-12b

**FRESNO ADI  
HISPANIC AGE/SEX DISTRIBUTION**

|                        | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|------------------------|---------------------------------|--------------------------------|
| <b>Males 18 - 34</b>   | 37.9                            | 12.7 %                         |
| 35 - 49                | 20.0                            | 6.7                            |
| 50 - 64                | 12.6                            | 4.2                            |
| 65+                    | 5.7                             | 1.9                            |
| <b>Females 18 - 34</b> | 42.4                            | 14.2                           |
| 35 - 49                | 21.8                            | 7.3                            |
| 50 - 64                | 11.7                            | 3.9                            |
| 65+                    | 6.0                             | 2.0                            |
| <b>Teens 12 - 17</b>   | 45.1                            | 15.1                           |
| <b>Children 0 - 11</b> | 95.4                            | 31.9                           |
| <b>TOTAL</b>           | 298.6                           | 100.0 %                        |

Source: Market Statistics, Inc.  
Strategy Research Corporation

The largest county in terms of number of Hispanics in the ADI is Fresno County, with a little more than half, or 150,000, of total Hispanic persons located there. The Hispanic population of Fresno County experienced a growth of 76.9% over the 1970 level of 84,800.



# ADI-13

## Corpus Christi

The Corpus Christi ADI is currently comprised of 293,800 Hispanics, up 73% over the 1970 level of 169,800. Over half of the Hispanics reside in Nueces County, with a total of 153,900 Latins located in this county.

All counties with the Corpus Christi ADI have experienced an increased number of Hispanics, and Table IIIA-13a shows the county by county breakdown in terms of Hispanic population for 1970 and 1980.

**TABLE IIIA-13a**  
**CORPUS CHRISTI ADI**

| Counties     | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|--------------|-----------------------------------------|-----------------------------------------|
| Aransas      | 1.7                                     | 4.0                                     |
| Bee          | 7.4                                     | 13.8                                    |
| Brooks       | 6.1                                     | 8.1                                     |
| Deval        | 8.8                                     | 14.3                                    |
| Jim Hogg     | 3.7                                     | 5.7                                     |
| Jim Wells    | 17.8                                    | 30.1                                    |
| Kennedy      | 0.5                                     | 0.8                                     |
| Kleberg      | 12.8                                    | 20.0                                    |
| Nueces       | 87.8                                    | 153.9                                   |
| Refugio      | 3.0                                     | 5.0                                     |
| San Patricio | 20.2                                    | 38.1                                    |
| <b>TOTAL</b> | <b>169.8</b>                            | <b>293.8</b>                            |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

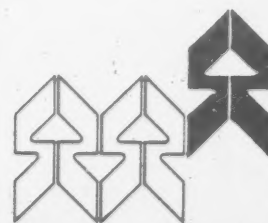


TABLE IIIA-13b

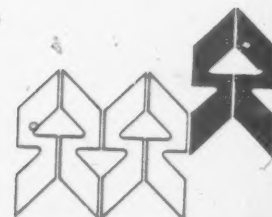
**CORPUS CHRISTI ADI  
HISPANIC AGE/SEX DISTRIBUTION**

|                 | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|-----------------|---------------------------------|--------------------------------|
| Males 18 - 34   | 36.8                            | 12.5 %                         |
| 35 - 49         | 18.2                            | 6.2                            |
| 50 - 64         | 15.3                            | 5.2                            |
| 65+             | 6.5                             | 2.2                            |
| Females 18 - 34 | 41.5                            | 14.1                           |
| 35 - 49         | 23.2                            | 7.9                            |
| 50 - 64         | 16.5                            | 5.6                            |
| 65+             | 8.8                             | 3.0                            |
| Teens 12 - 17   | 41.1                            | 14.0                           |
| Children 0 - 11 | 85.9                            | 29.2                           |
| <b>TOTAL</b>    | <b>293.8</b>                    | <b>100.0 %</b>                 |

Source: Market Statistics, Inc.  
Strategy Research Corporation

Corpus Christi's Hispanic market has a median age of 21.3 years, with 43.2% of the market being under 18 years of age. Furthermore, nearly 70% are under the age of 35.

The Corpus Christi Metropolitan Area (Nueces and San Patricio Counties) is 57% Hispanic, with 192,000 Hispanic persons and 143,400 non-Hispanic persons. The Latin Metro population grew 78% from 1970 (108,000 Hispanics) to 1980 (192,000 Hispanics), while the non-Hispanic population decreased 19% (from 176,800 non-Hispanic persons in 1970 to 143,400 today).



# ADI-14

## San Diego

TABLE IIIA-14a  
SAN DIEGO ADI

| Counties     | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|--------------|-----------------------------------------|-----------------------------------------|
| San Diego    | 102.5                                   | 278.6                                   |
| <b>TOTAL</b> | <b>102.5</b>                            | <b>278.6</b>                            |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

The San Diego ADI, the San Diego Metropolitan Area and San Diego County are all identical areas. The market has a current Hispanic population estimate of 278,600 persons. This is an increase of 171.8% over the 1970 level of 102,500 Hispanic persons.

The total population also experienced substantial growth between 1970 and 1980 (+37%). However, the Hispanic population grew seven times more than the non-Hispanic population. The non-Hispanic total in 1970 equalled 1,255,400; compared with 1,587,000 for 1980 — an increase of 26%. This compares to the 172% increase for the Latin segment.

Based on the 1980 estimates, Hispanics comprise almost 15% of the total population of the San Diego market (278,600 Hispanics and 1,865,600 total persons).

About 42.2% of the San Diego Hispanic market is under 18 years of age and 72.7% is under the age of 35. The median age of the San Diego Hispanic market is 21.3, slightly younger than the national Hispanic market's median age of 22.1.



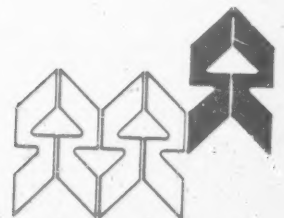
The adult Hispanic market in the San Diego ADI is rather evenly distributed in terms of their sex: 49.8% are male, while 50.2% are female.

Table IIIA-14b shows specifically the age and sex distribution of San Diego's Hispanic market.

**TABLE IIIA-14b**  
**SAN DIEGO ADI**  
**HISPANIC AGE/SEX DISTRIBUTION**

|                 | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|-----------------|---------------------------------|--------------------------------|
| Males 18 - 34   | 46.1                            | 16.5 %                         |
| 35 - 49         | 19.8                            | 7.1                            |
| 50 - 64         | 10.9                            | 3.9                            |
| 65+             | 3.6                             | 1.3                            |
| Females 18 - 34 | 39.0                            | 14.0                           |
| 35 - 49         | 24.0                            | 8.6                            |
| 50 - 64         | 11.7                            | 4.2                            |
| 65+             | 6.1                             | 2.2                            |
| Teens 12 - 17   | 37.5                            | 13.5                           |
| Children 0 - 11 | 79.9                            | 28.7                           |
| TOTAL           | 278.6                           | 100.0 %                        |

Source: Market Statistics, Inc.  
Strategy Research Corporation





## ADI-15

### Sacramento/Stockton

The seventeen counties which comprise the Sacramento/Stockton ADI contain 274,400 Spanish-speaking persons. The Latin population of the three county metro area (Placer, Sacramento and Yolo Counties), actually grew 133% in this ten year period from 53,300 in 1970 to 124,000 in 1980; while the total population grew 25%, from 800,600 to 997,600. Note that, although there are 13,500 Latins in Placer County and although the entire county is considered part of the metro area, a portion of the county is not part of the ADI definition.

TABLE IIIA-15a  
SACRAMENTO/STOCKTON ADI

| Counties          | 1970                            | 1980                            |
|-------------------|---------------------------------|---------------------------------|
|                   | Hispanic<br>Population<br>(000) | Hispanic<br>Population<br>(000) |
| Amador            | 0.5                             | 1.8                             |
| Calaveras         | 0.5                             | 1.6                             |
| Colusa            | 1.8                             | 3.3                             |
| Contra Costa East | 4.9                             | 9.4                             |
| El Dorado         | 1.3                             | 3.9                             |
| Nevada            | 0.5                             | 2.3                             |
| Placer West       | 4.5                             | 12.4                            |
| Plumas            | 0.2                             | 0.8                             |
| Sacramento        | 37.4                            | 86.1                            |
| San Joaquin       | 37.3                            | 64.9                            |
| Sierra            | 0.2                             | 0.9                             |
| Solano East       | 5.5                             | 14.9                            |
| Stanislaus        | 18.8                            | 34.5                            |
| Sutter            | 2.4                             | 6.5                             |
| Toulumne          | 1.0                             | 1.7                             |
| Yolo              | 11.0                            | 24.4                            |
| Yuba              | 2.2                             | 4.8                             |
| TOTAL             | 130.0                           | 274.4                           |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

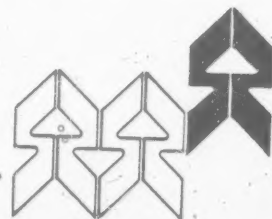


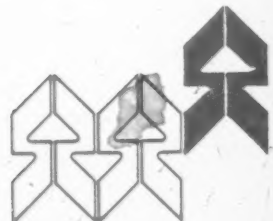
TABLE IIIA-15b

**SACRAMENTO/STOCKTON ADI  
HISPANIC AGE/SEX DISTRIBUTION**

|                        | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|------------------------|---------------------------------|--------------------------------|
| <b>Males 18 - 34</b>   | 37.0                            | 13.5 %                         |
| 35 - 49                | 21.4                            | 7.8                            |
| 50 - 64                | 13.2                            | 4.8                            |
| 65+                    | 6.6                             | 2.4                            |
| <b>Females 18 - 34</b> | 39.2                            | 14.3                           |
| 35 - 49                | 21.7                            | 7.9                            |
| 50 - 64                | 11.8                            | 4.3                            |
| 65+                    | 6.6                             | 2.4                            |
| <b>Teens 12 - 17</b>   | 37.9                            | 13.8                           |
| <b>Children 0 - 11</b> | 79.0                            | 28.8                           |
| <b>TOTAL</b>           | <b>274.4</b>                    | <b>100.0 %</b>                 |

Source: Market Statistics, Inc.  
Strategy Research Corporation

There are 124,000 Hispanics in the metro area, representing 12.4% of the total metro population. Major Spanish populations also can be found in San Joaquin and Stanislaus Counties. In fact, with 64,900 Latins, San Joaquin County is second only to Sacramento County in Hispanic population for the ADI. San Joaquin County, which contains the city of Stockton, is approximately 20% Hispanic. Because the ADI basically includes three metro areas (Sacramento, Stockton and Modesto), only 45% of the ADI Hispanics actually live within the Sacramento Metropolitan Area.



# ADI-16

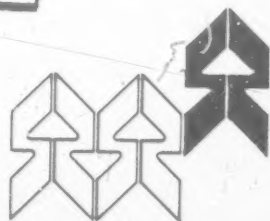
## Dallas/Fort Worth

TABLE IIIA-16a

### DALLAS/FORT WORTH ADI

| Counties        | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|-----------------|-----------------------------------------|-----------------------------------------|
| Anderson, Texas | 0.4                                     | 0.6                                     |
| Bosque          | 0.3                                     | 0.8                                     |
| Collin          | 3.0                                     | 9.0                                     |
| Comanche        | 0.7                                     | 1.3                                     |
| Cooke           | 0.2                                     | 0.8                                     |
| Dallas          | 61.4                                    | 146.0                                   |
| Delta           | 0.0                                     | 0.0                                     |
| Denton          | 1.7                                     | 6.1                                     |
| Ellis           | 3.3                                     | 8.0                                     |
| Erath           | 0.3                                     | 0.5                                     |
| Fannin          | 0.2                                     | 0.1                                     |
| Freestone       | 0.1                                     | 0.2                                     |
| Grayson         | 0.6                                     | 2.1                                     |
| Hamilton        | 0.1                                     | 0.2                                     |
| Henderson       | 0.3                                     | 0.3                                     |
| Hill            | 1.1                                     | 2.3                                     |
| Hood            | 0.0                                     | 0.1                                     |
| Hopkins         | 0.1                                     | 0.2                                     |
| Hunt            | 0.6                                     | 2.1                                     |
| Jack            | 0.0                                     | 0.0                                     |
| Johnson         | 0.8                                     | 3.1                                     |
| Kaufman         | 0.8                                     | 1.8                                     |
| Lamar           | 0.1                                     | 0.2                                     |
| Limestone       | 0.2                                     | 0.2                                     |
| Navarro         | 0.6                                     | 1.0                                     |
| Palo Pinto      | 1.1                                     | 2.4                                     |
| Parker          | 0.6                                     | 2.4                                     |
| Rains           | 0.0                                     | 0.2                                     |
| Rockwall        | 0.1                                     | 0.4                                     |
| Somervell       | 0.1                                     | 0.0                                     |
| Tarrant         | 31.0                                    | 63.4                                    |
| Van Zandt       | 0.3                                     | 0.6                                     |
| Wise            | 0.3                                     | 0.6                                     |
| Love, Oklahoma  | 0.0                                     | 0.0                                     |
| TOTAL           | 110.4                                   | 257.0                                   |

Source: U. S. Bureau of the Census  
Strategy Research Corporation



The current estimate of the 33 county Dallas-Fort Worth ADI Hispanic population totals 257,000 up 132.8% from the 1970 level of 110,400.

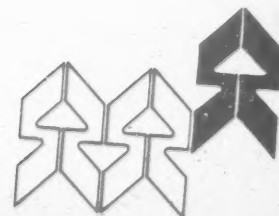
Table IIIA-16a shows the 1970 and 1980 Hispanic population for each of the ADI's 33 counties.

**TABLE IIIA-16a**  
**DALLAS-FORT WORTH ADI**  
**HISPANIC AGE/SEX DISTRIBUTION**

|                        | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|------------------------|---------------------------------|--------------------------------|
| <b>Males 18 - 34</b>   | 32.2                            | 12.5 %                         |
| 35 - 49                | 18.5                            | 7.2                            |
| 50 - 64                | 11.8                            | 4.6                            |
| 65+                    | 4.9                             | 1.9                            |
| <b>Females 18 - 34</b> | 39.1                            | 15.2                           |
| 35 - 49                | 23.4                            | 9.1                            |
| 50 - 64                | 13.6                            | 5.3                            |
| 65+                    | 8.2                             | 3.2                            |
| <b>Teens 12 - 17</b>   | 32.1                            | 12.5                           |
| <b>Children 0 - 11</b> | 73.2                            | 28.5                           |
| <b>TOTAL</b>           | <b>257.0</b>                    | <b>100.0 %</b>                 |

Source: Market Statistics, Inc.  
Strategy Research Corporation

The Dallas-Fort Worth metro, which includes Collin, Dallas, Denton, Ellis, Hood, Johnson, Kaufman, Parker, Rockwall, Tarrant and Wise Counties contains 240,900 Hispanic population, or 93.7% of all Hispanics in the Dallas-Fort Worth ADI. Approximately 9% of the total Metro population (of 2,769,200) is Hispanic. From 1970 to 1980 the total Dallas Metro grew 16% (from 2,378,200 to 2,769,200) while the Spanish segment grew 134% (from 103,000 to 240,900).



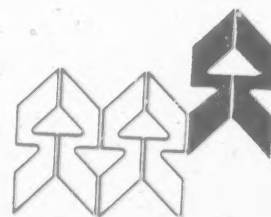
# ADI-17

## Denver

TABLE IIIA-17a  
DENVER ADI

| Counties           | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|--------------------|-----------------------------------------|-----------------------------------------|
| Adams, Colorado    | 18.7                                    | 37.3                                    |
| Arapahoe           | 4.8                                     | 14.6                                    |
| Boulder            | 5.7                                     | 11.8                                    |
| Chaffee            | 0.8                                     | 2.5                                     |
| Clear Creek        | 0.3                                     | 0.5                                     |
| Denver             | 62.6                                    | 100.8                                   |
| Douglas            | 0.1                                     | 0.3                                     |
| Eagle              | 1.7                                     | 4.1                                     |
| Elbert             | 0.0                                     | 0.0                                     |
| Garfield           | 0.4                                     | 1.1                                     |
| Gilpin             | 0.0                                     | 0.0                                     |
| Grand              | 1.1                                     | 0.3                                     |
| Gunnison           | 0.2                                     | 0.5                                     |
| Jackson            | 0.1                                     | 0.3                                     |
| Jefferson          | 5.7                                     | 15.4                                    |
| Lake               | 1.6                                     | 2.2                                     |
| Larimer            | 4.4                                     | 10.4                                    |
| Moffat             | 0.3                                     | 1.0                                     |
| Morgan             | 1.7                                     | 2.8                                     |
| Park               | 0.0                                     | 0.0                                     |
| Pitkin             | 0.0                                     | 0.0                                     |
| Rio Blanco         | 0.1                                     | 0.2                                     |
| Routt              | 0.2                                     | 0.8                                     |
| Summit             | 0.0                                     | 0.2                                     |
| Teller             | 0.0                                     | 0.2                                     |
| Washington         | 0.0                                     | 0.0                                     |
| Weld               | 10.8                                    | 19.6                                    |
| Cheyenne, Nebraska | 0.1                                     | 0.1                                     |
| Albany, Wyoming    | 1.9                                     | 2.0                                     |
| Carbon             | 2.2                                     | 3.0                                     |
| TOTAL              | 125.5                                   | 232.0                                   |

Source: U. S. Bureau of the Census  
Strategy Research Corporation



The Denver ADI, covering parts of Colorado, Nebraska and Wyoming, currently holds an Hispanic population of 232,000. This is an increase of 106,500 persons from the level in 1970 or a growth of 85% for the ten year period.

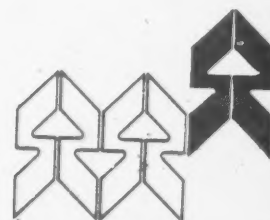
About 100,800 or 43.4% of all Hispanics in the ADI reside in Denver County. The seven county Metro Area (Adams, Arapahoe, Boulder, Denver, Douglas, Gilpin and Jefferson Counties) contains 180,200 Hispanics, or 78% of the ADI total.

**TABLE IIIA-17b**  
**DENVER ADI**  
**HISPANIC AGE/SEX DISTRIBUTION**

|                        | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|------------------------|---------------------------------|--------------------------------|
| <b>Males 18 - 34</b>   | 36.9                            | 15.9 %                         |
| 35 - 49                | 18.8                            | 8.1                            |
| 50 - 64                | 9.5                             | 4.1                            |
| 65+                    | 3.2                             | 1.4                            |
| <b>Females 18 - 34</b> | 42.0                            | 18.1                           |
| 35 - 49                | 19.7                            | 8.5                            |
| 50 - 64                | 10.0                            | 4.3                            |
| 65+                    | 4.4                             | 1.9                            |
| <b>Teens 12 - 17</b>   | 28.1                            | 12.1                           |
| <b>Children 0 - 11</b> | 59.4                            | 25.6                           |
| <b>TOTAL</b>           | 232.0                           | 100.0 %                        |

Source: Market Statistics, Inc.  
Strategy Research Corporation

With a total population of 1,563,700 and a Hispanic population of 180,200, the Denver Metropolitan Area is 11.5% Latin. Over 37% of all Hispanics in the Denver ADI are under 18 years of age, with a median age of 23.2 years. Additionally, 71.7% are under the age of 35.





# ADI-18

## Philadelphia

Since Spanish speaking persons represent only 2.6% of the total Philadelphia ADI population, many may not realize that this market is home for 183,000 Hispanics. Moreover, from 1970 to 1980, the Hispanic population has grown more than 2½ times, from 71,200 in 1970 to 183,000 in 1980. In this same ten year period the total population grew only 2% from 6,891,400 to 7,011,300.

TABLE IIIA-18a  
PHILADELPHIA ADI

| Counties             | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|----------------------|-----------------------------------------|-----------------------------------------|
| Kent, Delaware       | 1.0                                     | 1.5                                     |
| New Castle           | 4.6                                     | 6.3                                     |
| Atlantic, New Jersey | 2.6                                     | 10.4                                    |
| Burlington           | 2.6                                     | 15.9                                    |
| Camden               | 7.3                                     | 23.8                                    |
| Cape May             | 0.6                                     | 2.1                                     |
| Cumberland           | 5.5                                     | 16.9                                    |
| Gloucester           | 1.0                                     | 4.6                                     |
| Mercer               | 3.3                                     | 12.8                                    |
| Salem                | 0.4                                     | 1.3                                     |
| Warren               | 0.6                                     | 2.4                                     |
| Berks, Pennsylvania  | 2.7                                     | 4.8                                     |
| Bucks                | 1.7                                     | 6.2                                     |
| Chester              | 1.4                                     | 4.2                                     |
| Delaware             | 3.0                                     | 5.1                                     |
| Lehigh               | 1.0                                     | 2.7                                     |
| Monroe               | 0.1                                     | 0.2                                     |
| Montgomery           | 1.3                                     | 6.8                                     |
| Northampton          | 3.2                                     | 7.0                                     |
| Philadelphia         | 27.3                                    | 48.0                                    |
| <b>TOTAL</b>         | <b>71.2</b>                             | <b>183.0</b>                            |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

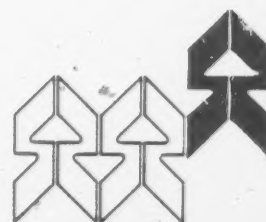


**TABLE IHA-186**  
**PHILADELPHIA ADI**  
**HISPANIC AGE/SEX DISTRIBUTION**

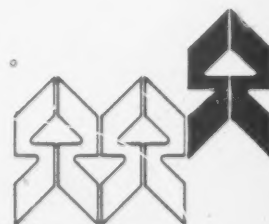
|                 | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|-----------------|---------------------------------|--------------------------------|
| Males 18 - 34   | 28.7                            | 15.7 %                         |
| 35 - 49         | 13.4                            | 7.3                            |
| 50 - 64         | 9.2                             | 5.0                            |
| 65+             | 3.7                             | 2.0                            |
| Females 18 - 34 | 31.8                            | 17.4                           |
| 35 - 49         | 14.6                            | 8.0                            |
| 50 - 64         | 10.1                            | 5.5                            |
| 65+             | 5.1                             | 2.8                            |
| Teens 12 - 17   | 22.0                            | 12.0                           |
| Children 0 - 11 | 44.4                            | 24.3                           |
| <b>TOTAL</b>    | <b>183.0</b>                    | <b>100.0 %</b>                 |

Source: Marke: Statistics, Inc.  
Strategy Research Corporation

The City of Philadelphia, in fact, saw the Spanish population grow by 76%, while the total population declined roughly 10% (Spanish—27,300 in 1970 and 48,000 in 1980, Total—1,948,600 in 1970 and 1,756,700 in 1980).

In addition to Philadelphia, with 48,000 Hispanics; sizable numbers of Latins can be found in Burlington, Camden and Cumberland Counties, New Jersey. Sixty-three percent of the ADI Spanish population reside with the Philadelphia metro boundaries.

Consistent with national patterns, the Hispanic residents of Philadelphia are younger than their non-Hispanic counterparts. Approximately 56% of the total population is under the age of 35, whereas almost 70% of the Latins within the ADI are younger than 35 years of age.



# ADI-19

## Tucson

TABLE IIIA-19a

### TUCSON ADI

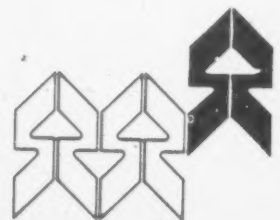
| Counties              | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|-----------------------|-----------------------------------------|-----------------------------------------|
| Apache South, Arizona | 0.2                                     | 0.6                                     |
| Cochise               | 15.1                                    | 33.4                                    |
| Pima                  | 55.5                                    | 125.8                                   |
| Santa Cruz            | 8.2                                     | 16.5                                    |
| Catron, New Mexico    | 0.6                                     | 1.2                                     |
| Hidalgo               | 2.4                                     | 4.6                                     |
| <b>TOTAL</b>          | <b>82.0</b>                             | <b>182.1</b>                            |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

The Tucson ADI presently is home for some 182,100 Hispanics and about 125,800 or 69.1% of these persons reside in the Metropolitan Area, Pima County.

Since 1970, when Hispanics in the Tucson market numbered 82,000, the population has increased by 100,100 Spanish speaking persons, a growth of 122.1% for the ten year period.<sup>9</sup> In this same period the ADI total population increased 38%, from 439,900 in 1970 to 609,100 in 1980.

Pima County, with the largest Hispanic population in the Tucson ADI, showed an increase of 70,300 Hispanic persons over the 1970 level of 55,500, a growth of 126.7% over the same ten year period. Cochise County, also within the Tucson ADI, more than doubled its Hispanic population, from 15,100 in 1970 to a 1980 level of 33,400.



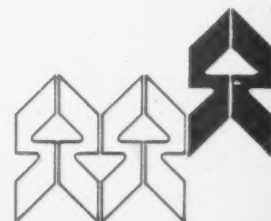
Unlike many of the major ADI's, the Hispanic proportion of total population is greater in the non-Metro counties. Whereas 26% of Tucson Metro residents are Latin (125,800 Hispanics and 491,600 total persons), 48% of the non-Metro population is Hispanic (56,300 Hispanics and 117,500 total persons). Table IIIA-19a shows the Hispanic population in 1970 and 1980 for the aforementioned counties as well as for the remaining counties located within the Tucson ADI. In terms of age, 38.3% of all Hispanics in the Tucson market are under 18 years of age, while 72.6% are under the age of 35.

**TABLE IIIA-19a**

**TUCSON ADI  
HISPANIC AGE/SEX DISTRIBUTION**

|                        | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|------------------------|---------------------------------|--------------------------------|
| <b>Males 18 - 34</b>   | 30.4                            | 16.7 %                         |
| 35 - 49                | 12.6                            | 6.9                            |
| 50 - 64                | 7.1                             | 3.9                            |
| 65+                    | 3.6                             | 2.0                            |
| <b>Females 18 - 34</b> | 32.0                            | 17.6                           |
| 35 - 49                | 13.3                            | 7.3                            |
| 50 - 64                | 8.4                             | 4.6                            |
| 65+                    | 4.9                             | 2.7                            |
| <b>Teens 12 - 17</b>   | 20.8                            | 11.4                           |
| <b>Children 0 - 11</b> | 49.0                            | 26.9                           |
| <b>TOTAL</b>           | 182.1                           | 100.0 %                        |

Source: Market Statistics, Inc.  
Strategy Research Corporation



# ADI-20

## Austin

From 1970 to 1980 the Austin ADI experienced tremendous Latin growth, with Hispanic population increasing 141% (58,000 persons to 139,800 persons). In this same ten year period the total population grew 35% (455,600 persons in 1970 and 614,400 persons in 1980).

TABLE IIIA-20a

### AUSTIN ADI

| Counties     | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|--------------|-----------------------------------------|-----------------------------------------|
| Bastrop      | 2.1                                     | 4.4                                     |
| Blanco       | 0.4                                     | 0.6                                     |
| Burnet       | 0.7                                     | 2.4                                     |
| Caldwell     | 5.8                                     | 10.8                                    |
| Fayette      | 0.3                                     | 0.8                                     |
| Hays         | 9.0                                     | 21.6                                    |
| Lee          | 0.1                                     | 0.5                                     |
| Llano        | 0.1                                     | 0.3                                     |
| Mason        | 0.4                                     | 0.9                                     |
| San Saba     | 0.7                                     | 1.5                                     |
| Travis       | 33.5                                    | 82.1                                    |
| Williamson   | 4.9                                     | 13.9                                    |
| <b>TOTAL</b> | <b>58.0</b>                             | <b>139.8</b>                            |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

Eighty-four percent of the Latins in the ADI reside within the Austin Metropolitan area (Hays, Travis and Williamson Counties), a pattern similar to the general population (84% within the metro).

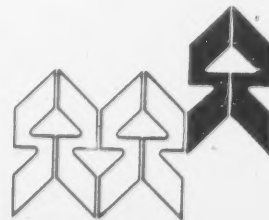


TABLE IIIA-206

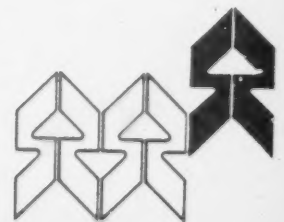
**AUSTIN ADI  
HISPANIC AGE/SEX DISTRIBUTION**

|                 | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|-----------------|---------------------------------|--------------------------------|
| Males 18 - 34   | 22.6                            | 16.2 %                         |
| 35 - 49         | 8.8                             | 6.3                            |
| 50 - 64         | 5.6                             | 4.0                            |
| 65+             | 2.8                             | 2.0                            |
| Females 18 - 34 | 24.3                            | 17.4                           |
| 35 - 49         | 10.1                            | 7.2                            |
| 50 - 64         | 6.6                             | 4.7                            |
| 65+             | 4.6                             | 3.3                            |
| Teens 12 - 17   | 15.5                            | 11.1                           |
| Children 0 - 11 | 38.9                            | 27.8                           |
| <b>TOTAL</b>    | <b>139.8</b>                    | <b>100.0 %</b>                 |

Source: Market Statistics, Inc.  
Strategy Research Corporation

Approximately 64% of the total population is under the age of 35. Among the Hispanic population, however, 72% are within this age segment.

Latins represent 23% of the total ADI population (139,800 Hispanics and 614,400 total persons). Travis County, which encompasses the City of Austin, is the largest Hispanic county with 82,100 Spanish-speaking persons. On a percentage basis, however, Hays County (just southwest of Travis) is the most "Latin" area; as 53% of the population is Hispanic — 21,600 Hispanic persons versus a total of 40,500 persons.





## ADI-21

### Tampa/St. Petersburg

Tampa-St. Petersburg ranks as the twenty-first Hispanic ADI, with 133,200 Spanish-speaking persons. The Latin population is highly concentrated within the vicinity of the City of Tampa. Whereas 28% of the total ADI population is in Hillsborough County (the home county of the City of Tampa); fully 73% of the Spanish persons reside here. In face, 84% of the ADI Hispanics live within the Metropolitan area (Hillsborough, Pasco and Pinellas Counties).

Hillsborough County is approximately 16% Hispanic (618,700 total population and 97,100 Hispanics); the three-county metro is 8% Latin (1,477,400 total and 112,000 Hispanics), and the ADI is 6% Hispanic (2,227,100 total and 133,200 Hispanics).

TABLE IIIA-21a

#### TAMPA/ST. PETERSBURG ADI

| Counties     | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|--------------|-----------------------------------------|-----------------------------------------|
| Citrus       | 0.2                                     | 0.7                                     |
| De Soto      | 0.1                                     | 0.3                                     |
| Hardee       | 2.2                                     | 4.6                                     |
| Hernando     | 0.2                                     | 0.5                                     |
| Highlands    | 0.2                                     | 0.5                                     |
| Hillsborough | 52.5                                    | 97.1                                    |
| Manatee      | 1.4                                     | 3.3                                     |
| Pasco        | 1.1                                     | 3.9                                     |
| Pinellas     | 5.2                                     | 11.0                                    |
| Polk         | 3.4                                     | 6.8                                     |
| Sarasota     | 1.9                                     | 4.5                                     |
| TOTAL        | 68.4                                    | 133.2                                   |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

The Latin community of Tampa/St. Petersburg is predominantly of Cuban origin. One of the key industries in the area and an industry with a substantial Cuban heritage is cigar manufacturing.

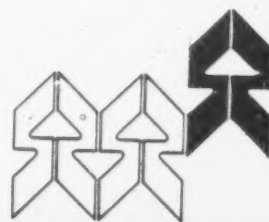


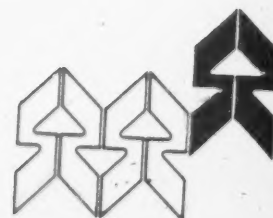
TABLE IIIA-21b

**TAMPA/ST. PETERSBURG ADI  
HISPANIC AGE/SEX DISTRIBUTION**

|                 | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|-----------------|---------------------------------|--------------------------------|
| Males 18 - 34   | 19.3                            | 14.5 %                         |
| 35 - 49         | 8.9                             | 6.7                            |
| 50 - 64         | 6.3                             | 4.7                            |
| 65+             | 5.7                             | 4.3                            |
| Females 18 - 34 | 22.1                            | 16.6                           |
| 35 - 49         | 10.0                            | 7.5                            |
| 50 - 64         | 7.6                             | 5.7                            |
| 65+             | 7.9                             | 5.9                            |
| Teens 12 - 17   | 14.7                            | 11.0                           |
| Children 0 - 11 | 30.7                            | 23.1                           |
| <b>TOTAL</b>    | <b>133.2</b>                    | <b>100.0 %</b>                 |

Source: Market Statistics, Inc.  
Strategy Research Corporation

This area experienced substantial growth through the seventies; however, in line with national trends, the Latin segment has grown at a much faster rate. From 1970 to 1980, the total population of the ADI grew 37% (from 1,627,000 to 2,227,100), and the Hispanic population grew 95% (from 68,400 to 133,200). Roughly the same pattern exists in the Metropolitan Area, where the total population grew 36% (1970 - 1,088,600, 1980 - 1,477,400) and the Hispanic population grew 90% (1970 - 58,800, 1980 - 112,000).



# ADI-22

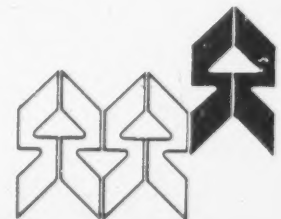
## Lubbock

TABLE IIIA-22a  
LUBBOCK ADI

| Counties     | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|--------------|-----------------------------------------|-----------------------------------------|
| Barley       | 1.9                                     | 3.5                                     |
| Borden       | 0.0                                     | 0.1                                     |
| Cochran      | 1.2                                     | 2.3                                     |
| Crosby       | 2.3                                     | 4.3                                     |
| Dawson       | 4.7                                     | 8.1                                     |
| De Baca      | 0.3                                     | 1.2                                     |
| Dickens      | 0.4                                     | 0.6                                     |
| Floyd        | 2.3                                     | 4.6                                     |
| Gaines       | 2.4                                     | 4.1                                     |
| Garza        | 0.7                                     | 1.7                                     |
| Hale         | 6.9                                     | 14.5                                    |
| Hockley      | 3.5                                     | 7.6                                     |
| Kent         | 0.2                                     | 0.3                                     |
| Lamb         | 3.5                                     | 6.9                                     |
| Lubbock      | 24.2                                    | 51.1                                    |
| Lynn         | 2.1                                     | 5.0                                     |
| Motley       | 0.0                                     | 0.2                                     |
| Scurry       | 1.3                                     | 4.0                                     |
| Terry        | 3.0                                     | 6.1                                     |
| Yoakum       | 1.1                                     | 2.5                                     |
| <b>TOTAL</b> | <b>62.0</b>                             | <b>128.7</b>                            |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

With a Hispanic population of 128,700 and a total population of 420,400, the Lubbock ADI is 31% Hispanic. Unlike most major Hispanic markets, the non-metro counties have a greater ratio of latins to non-Latins than does the metro. The Lubbock metropolitan area (Lubbock County) is 24% Hispanic, with 51,100 Latins and 165,300 non-Hispanics; the balance of the ADI counties are 38% Hispanic. In fact, while 57% of the non-Latin ADI population lives within the metropolitan area (165,300 non-Latins in Lubbock County and an ADI non-Latin total of 291,700), only 40% of the Hispanics live with the metro. Again, this is contrary to the national trend which shows Spanish-speaking persons heavily concentrated within metropolitan areas.

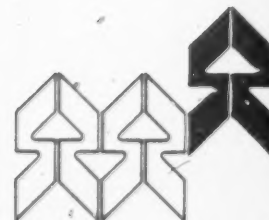


Since 1970, the Hispanic population has grown at a rate nine times greater than has the general population. In the 10 year period, the ADI total increased 12% (from 376,000 persons in 1970 to 420,400 in 1980). In this same period the Latin population rose 108%, from 62,000 to 128,700. This actually indicates an overall 10 year decline of the non-Hispanic residence of 22,300 persons, or 7%.

**TABLE IIIA-22b  
LUBBOCK ADI  
HISPANIC AGE/SEX DISTRIBUTION**

|                        | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|------------------------|---------------------------------|--------------------------------|
| <b>Males 18 - 34</b>   | 22.0                            | 17.1 %                         |
| 35 - 49                | 8.6                             | 6.7                            |
| 50 - 64                | 4.4                             | 3.4                            |
| 65+                    | 1.9                             | 1.5                            |
| <b>Females 18 - 34</b> | 23.2                            | 18.0                           |
| 35 - 49                | 9.4                             | 7.3                            |
| 50 - 64                | 4.6                             | 3.6                            |
| 65+                    | 2.2                             | 1.7                            |
| <b>Teens 12 - 17</b>   | 14.8                            | 11.5                           |
| <b>Children 0 - 11</b> | 37.6                            | 29.2                           |
| <b>TOTAL</b>           | 128.7                           | 100.0 %                        |

Source: Market Statistics, Inc.  
Strategy Research Corporation



## ADI-23

### Salinas/Monterey

The Hispanic population of the Salinas/Monterey ADI nearly doubled in the ten year period from 1970 to 1980 (55,300 to 108,600). In this same period of time, the non-Spanish population rose 18%, from 336,800 persons to 398,200.

TABLE IIIA-23a

#### SALINAS/MONTEREY ADI

| Counties   | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|------------|-----------------------------------------|-----------------------------------------|
| Monterey   | 38.1                                    | 70.5                                    |
| San Benito | 6.4                                     | 14.9                                    |
| Santa Cruz | 10.8                                    | 23.2                                    |
| TOTAL      | 55.3                                    | 108.6                                   |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

Twenty-three percent of the metro population (Monterey County) is Hispanic (70,500 Hispanic persons and 299,200 total persons) and, while 65% of the Hispanic ADI populus is concentrated in Monterey County, 57% of the non-Spanish population reside within this county.

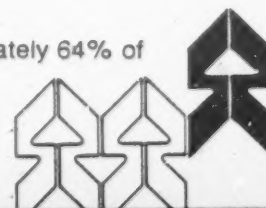
TABLE IIIA-23b

#### SALINAS/MONTEREY ADI HISPANIC AGE/SEX DISTRIBUTION

|                 | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|-----------------|---------------------------------|--------------------------------|
| Males 18 - 34   | 24.7                            | 22.7 %                         |
| 35 - 49         | 7.5                             | 6.9                            |
| 50 - 64         | 3.9                             | 3.6                            |
| 65+             | 1.6                             | 1.5                            |
| Females 18 - 34 | 16.8                            | 15.5                           |
| 35 - 49         | 7.2                             | 6.6                            |
| 50 - 64         | 4.2                             | 3.9                            |
| 65+             | 2.1                             | 1.9                            |
| Teens 12 - 17   | 11.5                            | 10.6                           |
| Children 0 - 11 | 29.1                            | 26.8                           |
| TOTAL           | 108.6                           | 100.0 %                        |

Source: Market Statistics, Inc.  
Strategy Research Corporation

The ADI is a "young" market, with 76% of Hispanics under the age of 35 and approximately 64% of the total persons under 35 years of age.



## ADI-24

# Laredo

With 106,900 Hispanic persons, Laredo ranks as the 24th largest Hispanic ADI. However, on a Spanish percent penetration basis, it is the number one major Hispanic market; as Spanish-speaking persons comprise 94% of the total population (106,900 Hispanics and 113,800 total persons).

Laredo lies on the Mexican border with another city — Nuevo Laredo — just over the river. In effect, it is a "twin city" market much like Minneapolis-St. Paul.

TABLE IIIA-24a

### LAREDO ADI

| Counties     | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|--------------|-----------------------------------------|-----------------------------------------|
| Webb         | 53.8                                    | 98.8                                    |
| Zapata       | 3.7                                     | 8.1                                     |
| <b>TOTAL</b> | <b>57.5</b>                             | <b>106.9</b>                            |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

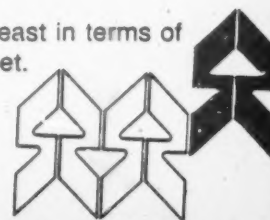
TABLE IIIA-24b

### LAREDO ADI HISPANIC AGE/SEX DISTRIBUTION

|                 | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|-----------------|---------------------------------|--------------------------------|
| Males 18 - 34   | 11.0                            | 10.3 %                         |
| 35 - 49         | 6.7                             | 6.3                            |
| 50 - 64         | 5.5                             | 5.1                            |
| 65+             | 3.4                             | 3.2                            |
| Females 18 - 34 | 13.1                            | 12.3                           |
| 35 - 49         | 8.4                             | 7.9                            |
| 50 - 64         | 7.1                             | 6.6                            |
| 65+             | 6.0                             | 5.6                            |
| Teens 12 - 17   | 14.4                            | 13.5                           |
| Children 0 - 11 | 31.3                            | 29.3                           |
| <b>TOTAL</b>    | <b>106.9</b>                    | <b>100.0 %</b>                 |

Source: Market Statistics, Inc.  
Strategy Research Corporation

The population of Nuevo Laredo, Mexico is estimated at 225,000 persons. Thus, at least in terms of Hispanic marketing implications, one could consider Laredo the twelfth largest market.





## ADI-25

### Odessa/Midland

TABLE IIIA-25a

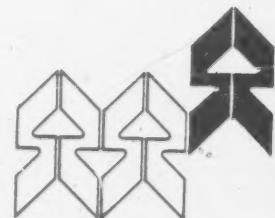
ODESSA/MIDLAND ADI

| Counties              | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|-----------------------|-----------------------------------------|-----------------------------------------|
| Lea South, New Mexico | 0.7                                     | 1.2                                     |
| Andrews, Texas        | 0.5                                     | 1.4                                     |
| Brewster              | 3.3                                     | 5.1                                     |
| Crane                 | 0.3                                     | 0.7                                     |
| Crockett              | 1.1                                     | 2.9                                     |
| Culberson             | 1.5                                     | 3.4                                     |
| Ector, Texas          | 9.7                                     | 24.6                                    |
| Glasscock             | 0.3                                     | 0.3                                     |
| Howard                | 4.7                                     | 9.3                                     |
| Jeff Davis            | 0.7                                     | 1.5                                     |
| Loving                | 0.1                                     | 0.3                                     |
| Martin                | 1.4                                     | 3.2                                     |
| Midland               | 5.1                                     | 12.8                                    |
| Peco's                | 4.1                                     | 8.9                                     |
| Presidio              | 3.2                                     | 5.4                                     |
| Reagan                | 0.4                                     | 0.7                                     |
| Rosoves               | 7.2                                     | 12.6                                    |
| Terrell               | 0.7                                     | 1.2                                     |
| Upton                 | 0.8                                     | 1.7                                     |
| Ward                  | 2.5                                     | 5.0                                     |
| Winkler               | 1.0                                     | 2.0                                     |
| TOTAL                 | 49.3                                    | 104.2                                   |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

The Odessa/Midland ADI is 30% Hispanic, with a total population of 345,100 persons and an Hispanic population of 104,200.

From 1970 to 1980, the Hispanic population of the ADI more than doubled; from 49,300 in 1970 to 104,200 in 1980.



Somewhat atypically, the Latin population is not overwhelmingly concentrated within the metropolitan area. The Odessa metro (Ector County) with 24,600 Latins, contains 24% of the ADI total Spanish persons.

If the Odessa and Midland metros are combined (Ector and Midland Counties), the dLatin population now represents 36% of the total ADI Latins. This is still well below national norms.

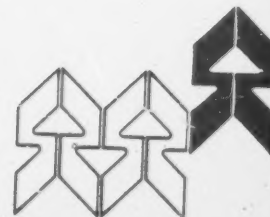
Typical of the total U.S. Hispanic market, the Odessa/Midland Hispanic community is very young. Seventy-two percent of the Latin persons are under the age of 35.

**TABLE IIIA-25b**

**ODESSA/MIDLAND ADI  
HISPANIC AGE/SEX DISTRIBUTION**

|                        | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|------------------------|---------------------------------|--------------------------------|
| <b>Males 18 - 34</b>   | 15.9                            | 15.3 %                         |
| 35 - 49                | 8.6                             | 8.3                            |
| 50 - 64                | 4.7                             | 4.5                            |
| 65+                    | 2.3                             | 2.1                            |
| <b>Females 18 - 34</b> | 17.0                            | 16.3                           |
| 35 - 49                | 7.8                             | 7.5                            |
| 50 - 64                | 4.5                             | 4.3                            |
| 65+                    | 1.6                             | 1.5                            |
| <b>Teens 12 - 17</b>   | 12.7                            | 12.2                           |
| <b>Children 0 - 11</b> | 29.1                            | 27.9                           |
| <b>TOTAL</b>           | <b>104.2</b>                    | <b>100.0 %</b>                 |

Source: Market Statistics, Inc.  
Strategy Research Corporation



## ADI-26

### Colorado Springs/Pueblo

The Colorado Springs/Pueblo ADI currently is the home for 102,500 Hispanic persons, an increase of 39,430 Spanish speaking persons since 1970. Thus, we see an increase in the number of Hispanic persons in the area of over 62% from the 1970 total figure of 63,070.

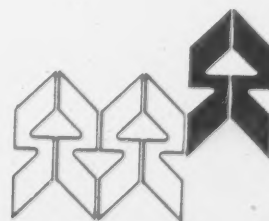
TABLE IIIA-26a

#### COLORADO SPRINGS/PUEBLO ADI

| Counties       | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|----------------|-----------------------------------------|-----------------------------------------|
| Baca, Colorado | 0.2                                     | 0.5                                     |
| Bent           | 0.9                                     | 1.8                                     |
| Cheyenne       | 0.5                                     | 0.2                                     |
| Crowley        | 0.5                                     | 0.8                                     |
| Custer         | 0.0                                     | 0.0                                     |
| El Paso        | 13.3                                    | 27.0                                    |
| Fremont        | 1.3                                     | 2.2                                     |
| Huerfano       | 2.6                                     | 3.6                                     |
| Kiowa          | *                                       | 0.2                                     |
| Las Animas     | 5.9                                     | 8.3                                     |
| Lincoln        | *                                       | 0.2                                     |
| Mineral        | 0.0                                     | 0.0                                     |
| Otero          | 6.3                                     | 10.1                                    |
| Prowers        | 1.8                                     | 2.7                                     |
| Pueblo         | 29.7                                    | 44.9                                    |
| TOTAL          | 63.0                                    | 102.5                                   |

\*Designates a Hispanic population of less than 100 persons.

Source: U. S. Bureau of the Census  
Strategy Research Corporation



In terms of density, about 43% or 44,900 of these Hispanic persons take residence in Pueblo County, which has experienced a growth in the number of Hispanics of over 50% since 1970. El Paso County accounts for 27,000 Spanish speaking persons — more than twice as many as in the 1970 — while an additional 10,000 reside in Otero County.

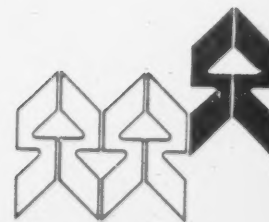
The Hispanic population of the Colorado Springs/Pueblo ADI can be considered young; 37.6% are under the age of 18, while about 72% are 34 years of age or younger. The average age of the Hispanic population living in the Colorado Springs/Pueblo market is 26.

TABLE IIIA-26b

**COLORADO SPRINGS/PUEBLO ADI  
HISPANIC AGE/SEX DISTRIBUTION**

|                        | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|------------------------|---------------------------------|--------------------------------|
| <b>Males 18 - 34</b>   | 16.5                            | 16.1 %                         |
| 35 - 49                | 8.1                             | 7.9                            |
| 50 - 64                | 4.2                             | 4.1                            |
| 65+                    | 1.2                             | 1.2                            |
| <b>Females 18 - 34</b> | 18.8                            | 18.3                           |
| 35 - 49                | 8.8                             | 8.6                            |
| 50 - 64                | 4.3                             | 4.2                            |
| 65+                    | 2.1                             | 2.0                            |
| <b>Teens 12 - 17</b>   | 12.6                            | 12.3                           |
| <b>Children 0 - 11</b> | 25.9                            | 25.3                           |
| <b>TOTAL</b>           | 102.5                           | 100.0 %                        |

Source: Market Statistics, Inc.  
Strategy Research Corporation



# ADI-27

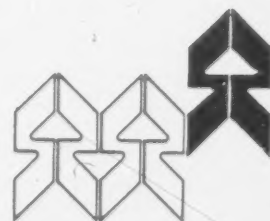
## Washington, D.C.

TABLE IIIA-27a

### WASHINGTON, D.C. ADI

| Counties                    | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|-----------------------------|-----------------------------------------|-----------------------------------------|
| District of Columbia, D. C. | 15.9                                    | 29.9                                    |
| Allegany, Maryland          | 0.0                                     | 0.2                                     |
| Calvert                     | 0.0                                     | 0.2                                     |
| Charles                     | 0.0                                     | 0.4                                     |
| Frederick                   | 0.4                                     | 0.6                                     |
| Montgomery                  | 15.7                                    | 22.2                                    |
| Prince George's             | 14.5                                    | 18.0                                    |
| St. Mary's                  | 0.8                                     | 1.2                                     |
| Washington                  | 0.0                                     | 0.4                                     |
| Arlington, Virginia         | 6.3                                     | 5.9                                     |
| Clarke                      | 0.0                                     | 0.0                                     |
| Culpeper                    | 0.0                                     | 0.0                                     |
| Fairfax                     | 11.8                                    | 15.3                                    |
| Fauquier                    | 0.0                                     | 0.2                                     |
| Frederick                   | 0.0                                     | 0.1                                     |
| King George                 | 0.0                                     | 0.0                                     |
| Loudoun                     | 0.5                                     | 0.8                                     |
| Madison                     | 0.0                                     | 0.0                                     |
| Prince William              | 2.3                                     | 3.5                                     |
| Rappahannock                | 0.0                                     | 0.0                                     |
| Shenandoah                  | 0.0                                     | 0.1                                     |
| Spotsylvania                | 0.0                                     | 0.0                                     |
| Stafford                    | 0.0                                     | 0.2                                     |
| Warren                      | 0.0                                     | 0.1                                     |
| Westmoreland                | 0.0                                     | 0.0                                     |
| Franklin, Pennsylvania      | 0.0                                     | 0.3                                     |
| Fulton                      | 0.0                                     | 0.0                                     |
| Berkeley, West Virginia     | 0.0                                     | 0.1                                     |
| Hampshire                   | 0.0                                     | 0.0                                     |
| Hardy                       | 0.0                                     | 0.0                                     |
| Jefferson                   | 0.0                                     | 0.1                                     |
| Mineral                     | 0.0                                     | 0.2                                     |
| Morgan                      | 0.0                                     | 0.0                                     |
| TOTAL                       | 68.2                                    | 100.0                                   |

Source: U. S. Bureau of the Census  
Strategy Research Corporation



The Washington, D.C. ADI, which includes portions of Maryland, Virginia, West Virginia and Pennsylvania, contains a total of 100,000 Spanish persons. This reflects an increase of 46.6% or 31,800 Hispanic persons since 1970.

A total of 29,900 Spanish speaking persons take residence in the District of Columbia, while 22,200 reside in Montgomery County, Maryland. An additional 18,000 Hispanic persons live in Prince George's County, Maryland, and 15,300 in Fairfax County, Virginia.

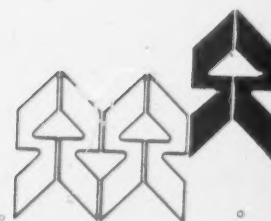
About two-thirds of all Hispanics living in the market are under 35 years of age, while children and teens account for over one-third of the Hispanic population in the Washington, D.C. ADI.

TABLE IIIA-27b

WASHINGTON, D.C. ADI  
HISPANIC AGE/SEX DISTRIBUTION

|                 | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|-----------------|---------------------------------|--------------------------------|
| Males 18 - 34   | 16.4                            | 16.4 %                         |
| 35 - 49         | 8.3                             | 8.3                            |
| 50 - 64         | 5.7                             | 5.7                            |
| 65+             | 2.3                             | 2.3                            |
| Females 18 - 34 | 16.5                            | 16.5                           |
| 35 - 49         | 8.8                             | 8.8                            |
| 50 - 64         | 5.9                             | 5.9                            |
| 65+             | 2.5                             | 2.5                            |
| Teens 12 - 17   | 11.4                            | 11.4                           |
| Children 0 - 11 | 22.2                            | 22.2                           |
| TOTAL           | 100.0                           | 100.0 %                        |

Source: Market Statistics, Inc.  
Strategy Research Corporation





## ADI-28

### El Centro/Yuma

The El Centro/Yuma ADI is comprised of two counties: Yuma, Arizona and Imperial, California, which contain a total of 79,500 Hispanic persons.

The Hispanic population in this market has more than doubled since 1970, from 35,900 in that year to the aforementioned 1980 figure of 79,500.

Yuma County, Arizona, is home for 26,400 Spanish speaking persons, while 53,100 live in Imperial County, California. Both have more than doubled in number of Hispanic persons since 1970.

TABLE IIIA-28a

#### EL CENTRO/YUMA ADI

| Counties             | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|----------------------|-----------------------------------------|-----------------------------------------|
| Yuma, Arizona        | 10.6                                    | 26.4                                    |
| Imperial, California | 25.3                                    | 53.1                                    |
| <b>TOTAL</b>         | <b>35.9</b>                             | <b>79.5</b>                             |

Source: U.S. Bureau of the Census  
Strategy Research Corporation

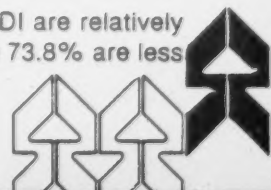
TABLE IIIA-28b

#### EL CENTRO/YUMA ADI HISPANIC AGE/SEX DISTRIBUTION

|                        | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|------------------------|---------------------------------|--------------------------------|
| <b>Males 18 - 34</b>   | 11.7                            | 14.7 %                         |
| 35 - 49                | 5.2                             | 6.6                            |
| 50 - 64                | 3.2                             | 4.0                            |
| 65+                    | 1.2                             | 1.5                            |
| <b>Females 18 - 34</b> | 11.3                            | 14.2                           |
| 35 - 49                | 6.1                             | 7.7                            |
| 50 - 64                | 3.4                             | 4.3                            |
| 65+                    | 1.7                             | 2.1                            |
| <b>Teens 12 - 17</b>   | 11.0                            | 13.8                           |
| <b>Children 0 - 11</b> | 24.7                            | 31.1                           |
| <b>TOTAL</b>           | <b>79.5</b>                     | <b>100.0 %</b>                 |

Source: Market Statistics, Inc.  
Strategy Research Corporation

As is the case with the majority of Hispanic markets, Hispanics in El Centro/Yuma ADI are relatively young, with an average age of 24.5 years. Nearly 45% are under the age of 18, while 73.8% are less than 35 years old.



# ADI-29

## Detroit

TABLE IIIA-29a

### DETROIT ADI

| Counties         | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|------------------|-----------------------------------------|-----------------------------------------|
| Lapeer, Michigan | 0.8                                     | 1.4                                     |
| Livingston       | 0.5                                     | 0.9                                     |
| Macomb           | 5.0                                     | 6.3                                     |
| Monroe           | 1.8                                     | 2.4                                     |
| Oakland          | 10.0                                    | 13.1                                    |
| St. Clair        | 1.2                                     | 1.7                                     |
| Washtenaw        | 2.3                                     | 3.0                                     |
| Wayne            | 40.0                                    | 42.0                                    |
| <b>TOTAL</b>     | <b>61.6</b>                             | <b>70.8</b>                             |

Source: U. S. Bureau of the Census  
Strategy Research Corporation

A total of 70,800 Spanish speaking persons currently reside in the Detroit ADI, 42,000 of which take residence in Wayne County. An additional 13,100 live in Oakland County, and these two counties comprise over three quarters of the Detroit market's total Hispanic population.

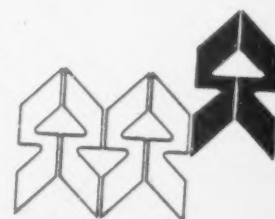
About 38.8% of Detroit's Hispanics are teens or children under the age of 18, while over 70% are 34 years of age or younger.

TABLE IIIA-29b

### DETROIT ADI HISPANIC AGE/SEX DISTRIBUTION

|                        | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|------------------------|---------------------------------|--------------------------------|
| <b>Males 18 - 34</b>   | <b>10.8</b>                     | <b>15.3 %</b>                  |
| 35 - 49                | 4.7                             | 6.7                            |
| 50 - 64                | 3.1                             | 4.4                            |
| 65+                    | 1.8                             | 2.5                            |
| <b>Females 18 - 34</b> | <b>11.6</b>                     | <b>16.4</b>                    |
| 35 - 49                | 5.6                             | 7.9                            |
| 50 - 64                | 4.0                             | 5.6                            |
| 65+                    | 1.7                             | 2.4                            |
| <b>Teens 12 - 17</b>   | <b>11.0</b>                     | <b>15.5</b>                    |
| <b>Children 0 - 11</b> | <b>16.5</b>                     | <b>23.3</b>                    |
| <b>TOTAL</b>           | <b>70.8</b>                     | <b>100.0 %</b>                 |

Source: Market Statistics Inc.  
Strategy Research Corporation



# ADI-30

## Waco/Temple

The Waco/Temple ADI has experienced considerable growth in the number of Spanish speaking persons since 1970. Currently, the Hispanic population is estimated at 67,700, compared with 28,350 in 1970, an increase of 39,350 persons or 138.8%.

TABLE IIIA-30a

### WACO/TEMPLE ADI

| Counties     | 1970<br>Hispanic<br>Population<br>(000) | 1980<br>Hispanic<br>Population<br>(000) |
|--------------|-----------------------------------------|-----------------------------------------|
| Bell, Texas  | 8.2                                     | 22.0                                    |
| Brazos       | 4.9                                     | 12.0                                    |
| Burleson     | 0.9                                     | 1.5                                     |
| Coryell      | 1.6                                     | 5.5                                     |
| Falls        | 1.2                                     | 2.2                                     |
| Lampasas     | 0.7                                     | 1.7                                     |
| Leon         | *                                       | 0.2                                     |
| Madison      | 0.3                                     | 0.7                                     |
| McLennan     | 8.1                                     | 17.2                                    |
| Milan        | 1.1                                     | 2.3                                     |
| Mills        | 0.2                                     | 0.5                                     |
| Robertson    | 1.1                                     | 1.9                                     |
| <b>TOTAL</b> | <b>28.3</b>                             | <b>67.7</b>                             |

\*Designates an Hispanic population of less than 100 persons.

Source: U. S. Bureau of the Census  
Strategy Research Corporation

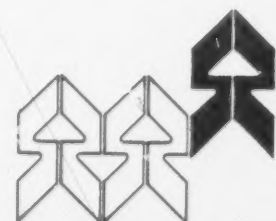


TABLE IIIA-30b

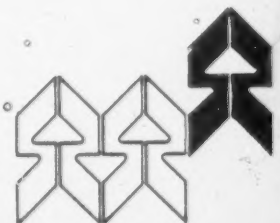
**WACO/TEMPLE ADI  
HISPANIC AGE/SEX DISTRIBUTION**

|                        | Hispanic<br>Population<br>(000) | Percent<br>Distribution<br>(%) |
|------------------------|---------------------------------|--------------------------------|
| <b>Males 18 - 34</b>   | 9.1                             | 13.5 %                         |
| 35 - 49                | 4.7                             | 6.9                            |
| 50 - 64                | 2.8                             | 4.2                            |
| 65+                    | 1.1                             | 1.6                            |
| <b>Females 18 - 34</b> | 10.2                            | 15.0                           |
| 35 - 49                | 5.6                             | 8.3                            |
| 50 - 64                | 3.0                             | 4.4                            |
| 65+                    | 1.4                             | 2.1                            |
| <b>Teens 12 - 17</b>   | 8.9                             | 13.1                           |
| <b>Children 0 - 11</b> | 20.9                            | 30.9                           |
| <b>TOTAL</b>           | 67.7                            | 100.0 %                        |

Source: Market Statistics, Inc.  
Strategy Research Corporation

Bell County, Texas, currently contains some 22,000 Spanish speaking persons, up from 8,200 in 1970, while an additional 17,200 Hispanics reside in McLennan County. Brazos County is currently the home for 12,000 Hispanic persons.

About 72.5% of all Hispanics residing in the Waco/Temple ADI are under 35 years of age, with 44% being under the age of 18.



## B. United States/Mexico Border Markets

An estimated 2.8 million Hispanic persons live immediately south of the U.S./Mexico border. Table IIIB-1 depicts five major "twin city" markets with a total Hispanic population of almost 4 million persons — approximately 2.5 million in the Mexico markets and 1.5-million in the U.S. ADI's.

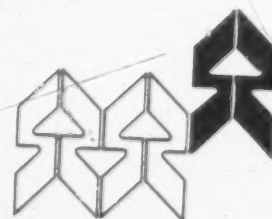
**TABLE IIIB-1**  
**HISPANIC POPULATION**  
**U.S./MEXICO BORDER MARKETS**

| Market                               | Number of<br>Hispanic<br>Persons |
|--------------------------------------|----------------------------------|
| El Centro - Yuma ADI                 | 79,500                           |
| Mexicali, Mexico                     | 550,000+                         |
| El Centro - Yuma - Mexicali          | 629,500+                         |
| El Paso ADI                          | 474,300                          |
| Juarez, Mexico                       | 600,000+                         |
| El Paso - Juarez                     | 1,074,300+                       |
| Laredo ADI                           | 106,900                          |
| Nuevo Laredo, Mexico                 | 225,000+                         |
| Laredo - Nuevo Laredo                | 331,900+                         |
| McAllen - Brownsville ADI            | 533,800                          |
| Matamoros, Mexico                    | 450,000+                         |
| McAllen - Brownsville -<br>Matamoros | 983,800+                         |
| San Diego ADI                        | 278,600                          |
| Tijuana, Mexico                      | 640,000+                         |
| San Diego - Tijuana                  | 918,600+                         |

Source: Mexican Government Census Update  
Strategy Research Corporation

In a very real sense, these markets consist of "sister cities", much like Minneapolis-St. Paul or San Francisco-Oakland. With their proximity and continual traffic flow back and forth, they are virtually inseparable.

Laredo, Texas and Nuevo Laredo, Mexico, for example, are immediately adjacent to one another; separated by the Rio Grande. Travel between the two markets is constant, and many of the Mexican citizens shop and work on the U.S. side of the border. Commonly referred to as "border commuters", it is difficult to quantify their exact numbers. However, a look at some consumer spending indicators hint at their impact on the Laredo, Texas market. For the year 1978, Laredo Metro area residents had an aggregate Consumer Spendable Income of \$335 million. For this same period, the market's Total Retail Sales were \$466 million! Obviously, substantial dollars are being spent in the market by non-residents.





In fact, if we view these indicators in terms of rank among all U.S. metros, the extent to which Mexican citizens must be shopping on the U.S. side of the border is strikingly apparent. (See Table IIIB-2 on the following page.)

Laredo ranks 348th among all U.S. metros for total Consumer Spendable Income, yet it ranks 288th for Total Retail Sales and the market is **second** ranked for Total Retail Sales per Household.

The Brownsville-Harlingen-San Benito Texas Standard Metropolitan Statistical Area (Cameron County) ranks 166th among all U.S. metros in terms of population size; and it ranks 222nd in aggregate Consumer Spendable Income. Yet it moves up to 176 rank for Total Retail Sales and a startling 85th rank for Total Retail Sales per Household. The other border markets show similar patterns.

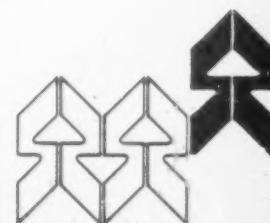
Although the exact proportion of dollars expended on each side of the border may be difficult to determine, the fact remains that radio and TV signals know no national boundaries. Mexican residents are certainly part of the broadcast audience of U.S. based stations. Moreover, looking at it from a language retention and cultural perspective, the constant border traffic reinforces ties with the homeland for Hispanic residents on the U.S. side, thereby helping to stimulate consumption of Spanish media.

TABLE IIIB-2

**METRO AREA RANKINGS  
U.S. METRO AREAS ONLY**

| Rank:                               | Brownsville-<br>Harlingen-<br>San Benito<br>SMSA | El<br>Paso<br>SMSA | Laredo<br>SMSA | McAllen-<br>Pharr-<br>Edinburg<br>SMSA |
|-------------------------------------|--------------------------------------------------|--------------------|----------------|----------------------------------------|
| Population                          | 166                                              | 87                 | 296            | 151                                    |
| Households                          | 185                                              | 97                 | 330            | 150                                    |
| Consumer Spendable Income           | 222                                              | 106                | 348            | 156                                    |
| Consumer Spendable Income/Household | 357                                              | 259                | 350            | 362                                    |
| Total Retail Sales                  | 176                                              | 80                 | 228            | 155                                    |
| Total Retail Sales/Household        | 85                                               | 37                 | 2              | 315                                    |
| Food Store Sales                    | 168                                              | 92                 | 215            | 149                                    |
| Drug Store Sales                    | 197                                              | 95                 | 245            | 167                                    |
| General Merchandise Sales           | 173                                              | 63                 | 242            | 138                                    |
| Apparel Store Sales                 | 96                                               | 69                 | 77             | 146                                    |
| Home-Furnishing Store Sales         | 172                                              | 160                | 74             | 176                                    |
| Automotive Store Sales              | 219                                              | 83                 | 359            | 178                                    |

Source: Standard Rate & Data Service





In Section III A of this report, Table III A listed the top 30 Hispanic ADI's. This section presents a new listing of these markets with the population of the U.S./Mexico "sister" markets included (Table III B-3). Four of these five border markets now rank in the top 10.

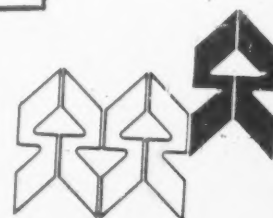
There are other U.S./Mexico "twin city" markets (in which population figures were more difficult to quantify) such as Tucson, Arizona-Nogales, Mexico and Eagle Pass, Texas-Piedras Negras, Mexico.

TABLE IIIB-3

**TOP 30 HISPANIC MARKETS**  
(Including U.S./Mexico Border Markets)

| Rank | Market                                      | Hispanic<br>Population<br>(000) |
|------|---------------------------------------------|---------------------------------|
| 1    | New York ADI                                | 2,329.8                         |
| 2    | Los Angeles ADI                             | 2,256.8                         |
| 3    | El Paso ADI/Juarez, Mexico                  | 1,074.3+                        |
| 4    | McAllen - Brownsville ADI/Matamoros, Mexico | 983.8+                          |
| 5    | San Diego ADI/Tijuana, Mexico               | 918.6+                          |
| 6    | San Antonio ADI                             | 849.6                           |
| 7    | Miami ADI                                   | 767.4                           |
| 8    | San Francisco ADI                           | 705.8                           |
| 9    | Chicago ADI                                 | 660.1                           |
| 10   | El Centro - Yuma ADI/Mexicali, Mexico       | 629.5+                          |
| 11   | Albuquerque ADI                             | 465.6                           |
| 12   | Houston ADI                                 | 459.4                           |
| 13   | Laredo ADI/Nuevo Laredo, Mexico             | 331.9+                          |
| 14   | Phoenix ADI                                 | 311.6                           |
| 15   | Fresno ADI                                  | 298.6                           |
| 16   | Corpus Christi ADI                          | 293.8                           |
| 17   | Sacramento-Stockton                         | 274.4                           |
| 18   | Dallas - Ft. Worth ADI                      | 257.0                           |
| 19   | Denver ADI                                  | 232.0                           |
| 20   | Philadelphia ADI                            | 183.0                           |
| 21   | Tucson ADI                                  | 182.1                           |
| 22   | Austin ADI                                  | 139.8                           |
| 23   | Tampa - St. Petersburg ADI                  | 133.2                           |
| 24   | Lubbock ADI                                 | 128.7                           |
| 25   | Salinas - Monterey ADI                      | 108.6                           |
| 26   | Odessa - Midland ADI                        | 104.2                           |
| 27   | Colorado Springs-Pueblo ADI                 | 102.5                           |
| 28   | Washington, D. C. ADI                       | 100.0                           |
| 29   | Detroit ADI                                 | 70.8                            |
| 30   | Waco - Temple ADI                           | 67.7                            |

Source: Mexican Government Census Update  
Strategy Research Corporation

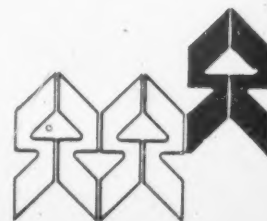


### C. Additional Hispanic Counties

The following table lists additional counties not covered by the 30 Major Hispanic ADI's, but which have Hispanic populations of 10,000 or more

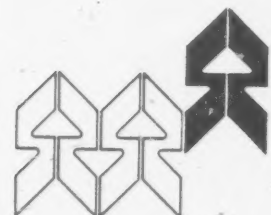
**TABLE IIIC**  
**ADDITIONAL COUNTIES WITH**  
**HISPANIC POPULATION OF 10,000**  
**OR MORE**

| State/County    | Hispanic<br>Population<br>(000) | ADI                                                 |
|-----------------|---------------------------------|-----------------------------------------------------|
| Arizona         |                                 |                                                     |
| Coconino        | 12.7                            | Flagstaff                                           |
| California      |                                 |                                                     |
| San Luis Obispo | 18.2                            | Santa Barbara -<br>Santa Maria -<br>San Luis Obispo |
| Connecticut     |                                 |                                                     |
| Hartford        | 29.8                            | Hartford -<br>New Haven                             |
| Florida         |                                 |                                                     |
| Collier         | 12.4                            | Ft. Myers                                           |
| Duval           | 11.2                            | Jacksonville                                        |
| Orange          | 18.2                            | Orlando -<br>Daytona Beach                          |
| Palm Beach      | 34.7                            | West Palm Beach                                     |
| Hawaii          |                                 |                                                     |
| Honolulu        | 24.3                            | Honolulu (Metro)                                    |
| Louisiana       |                                 |                                                     |
| Jefferson       | 17.7                            | New Orleans                                         |
| Orleans         | 27.4                            | New Orleans                                         |
| Massachusetts   |                                 |                                                     |
| Hampden         | 12.5                            | Springfield, Mass.                                  |
| Middlesex       | 16.3                            | Boston                                              |
| Suffolk         | 23.1                            | Boston                                              |
| Michigan        |                                 |                                                     |
| Saginaw         | 11.3                            | Flint - Saginaw -<br>Bay City                       |
| Missouri        |                                 |                                                     |
| Jackson         | 16.1                            | Kansas City                                         |
| St. Louis       | 10.5                            | St. Louis                                           |
| Nevada          |                                 |                                                     |
| Clark           | 23.6                            | Las Vegas                                           |
| New Mexico      |                                 |                                                     |
| Chaves          | 17.8                            | Roswell                                             |
| Curry           | 10.3                            | Amarillo                                            |
| Eddy            | 19.7                            | Roswell                                             |
| San Juan        | 10.1                            | Farmington                                          |

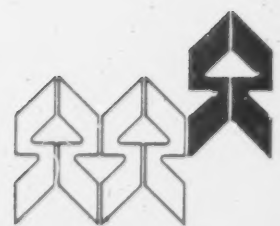


| State/County | Hispanic<br>Population<br>(000) | ADI                       |
|--------------|---------------------------------|---------------------------|
| New York     |                                 |                           |
| Erie         | 17.9                            | Buffalo                   |
| Monroe       | 15.3                            | Rochester                 |
| Ohio         |                                 |                           |
| Cuyahoga     | 21.1                            | Cleveland                 |
| Lorain       | 13.1                            | Cleveland                 |
| Lucas        | 10.2                            | Toledo                    |
| Oklahoma     |                                 |                           |
| Oklahoma     | 12.1                            | Oklahoma                  |
| Texas        |                                 |                           |
| Jefferson    | 14.0                            | Beaumont -<br>Pt. Arthur  |
| Taylor       | 15.6                            | Abilene                   |
| Tom Green    | 22.9                            | San Angelo                |
| Victoria     | 29.6                            | Victoria                  |
| Wichita      | 10.3                            | Wichita Falls -<br>Lawton |
| Utah         |                                 |                           |
| Salt Lake    | 27.8                            | Salt Lake City            |
| Washington   |                                 |                           |
| King         | 26.8                            | Seattle - Tacoma          |
| Pierce       | 12.4                            | Seattle - Tacoma          |
| Yakima       | 19.8                            | Yakima                    |
| Wisconsin    |                                 |                           |
| Milwaukee    | 18.9                            | Milwaukee                 |

Source: Strategy Research Corporation



## **IV. PUERTO RICO**



## **IV. Puerto Rico**

### **A. History**

The island of Puerto Rico was discovered on November 19, 1493, on Columbus' second voyage to the New World. Bound for Hispanola, Columbus instead came upon the island, naming it San Juan Bautista.

Colonization began in 1508 when Juan Ponce de Leon returned and established the capital city of San Juan. Ponce de Leon remained to serve as the Island's first governor.

On the harbor of San Juan was built a walled city which became one of the two great strongholds of the Spanish Main and a leading defensive bastion of the vast empire. Puerto Rico became a point of departure for expeditions to colonize and explore America.

The 19th Century brought expansion in foreign trade, growth in population, increased sugar and coffee production as well as a consciousness that Puerto Rico was becoming something more than a strategic outpost of the Spanish Main. In 1810 Puerto Ricans sent their first representatives to the Spanish Parliament.

The liberal movement of the 19th Century was crowned with success when a Charter of Autonomy was granted by Spain in 1897. It gave Puerto Rico self-government and included among other things a Parliament elected by the people, a means of negotiating commercial treaties with other countries and a vote for Puerto Rican representatives in the Spanish Parliament.

As a result of the Spanish-American War, Puerto Rico was ceded to the United States in 1898. The Jones Act of 1917 made the people of Puerto Rico citizens of the United States.

On July 25, 1952, Puerto Rico became a commonwealth voluntarily associated to the United States by means of a Compact which the voters of Puerto Rico approved at the polls. The Puerto Ricans wrote their own Constitution which embodied a new type of political freedom had a Bill of Rights and provided a republican form of government. It abolished the last traces of colonialism and fulfilled a long historical urge for self-determination.

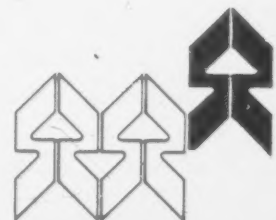
In November, 1953, the United Nations passed a resolution recognizing the Commonwealth as a self-governing country freely associated to the United States on the basis of common citizenship by means of a compact that cannot be unilaterally changed.

### **B. Economic Environment**

In addition to the flourishing business of tourism, Puerto Rico has committed itself to industrial development to further strengthen the island's economic base.

Grants totaling 10.1 million dollars were committed to 214 industrial projects during fiscal 1977 alone, under the Special Incentive Program funded by the Legislature of Puerto Rico. The Special Incentives Program is tailored to achieve three main objectives:

- To speed up location and expansion of mainland U.S. and foreign industries in Puerto Rico by defraying costly start-up expenditures by private investors.
- To induce manufacturers to establish operations in lesser developed sectors of the island through provision of larger grants in such sectors.
- To encourage and assist Puerto Rican investors to establish and expand manufacturing operations producing primarily for the local and mainland markets.





Cash grants provided under the program play a significant role in insuring the creation of new plant facilities, so vital to the program's job-and-payroll generation efforts. It is estimated that qualifying companies will employ some 11,700 workers, with annual cumulative payrolls totaling \$59.7 million. Private investments in machinery and equipment in these projects is already at an estimated \$74.3 million. It is anticipated that Puerto Rican income taxes, generated by direct and indirect employment stimulated by these operations, will defray the entire cost of the program to the Government.

The Puerto Rican Industrial Incentive Act of 1963 entitles qualifying firms establishing operations in the island to the following exemptions for ten, fifteen, twenty-five or thirty years, depending on the industrial zone in which they locate:

- Exemptions from income tax on their industrial development income.
- Exemption from real and personal property taxes.
- Exemption from license fees, exices and other municipal taxes.

These efforts reflect the tremendous willingness on the part of the Puerto Rican Government to expand business operations islandwide, thereby creating jobs and a strong economic base. Couple with federal funds from the U.S. Government these efforts have led to an increase in the expendable income of the island's inhabitants, resulting in the overall soundness of the Puerto Rican market.

In recent years the Puerto Rican government has taken further steps to diversify the economic structure of Puerto Rico, stimulating the development of the manufacturing and service industries, agriculture, tourism and construction. The end of fiscal year 1979 saw a real growth of 5.5%, the highest yearly economic growth on the island in the last six years.

### **C. Marketing in Puerto Rico**

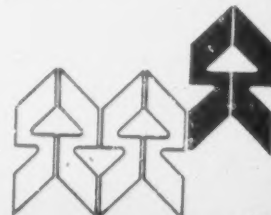
In 1955, an enterprising young New Jersey supermarketer established "Pueblo," the first chain of supermarkets in San Juan. Since then, what can truly be described as a revolution in distribution and marketing has occurred in the San Juan metropolitan area and taken hold in major cities such as Arecibo, Mayaguez and Ponce.

Soon after the "Pueblo" chain came "Todos," financed by the International Basic Economy Corporation and sold in 1959 to the giant Grand Union Company which is developing shopping centers as well as supermarkets in Puerto Rico. Other modern food distribution enterprises quickly followed so that by early 1960 there were 21 big new supermarkets in six cities. The year 1958 saw the beginnings of a veritable rush of retailers to Puerto Rico with well-known names like Sears Roebuck, Woolworth and Franklin.

Currently, Puerto Rico utilizes highly developed channels of distribution in terms of the supply of consumer products. At present, about half of all products sold in supermarkets on the island are distributed by food wholesalers, who purchase direct from manufacturers on the mainland as well as manufacturers' distributors on the island.

Several innovations with regard to the distribution of consumer goods in Puerto Rico are of great importance to marketers. One is the use of co-op advertising between manufacturer and wholesaler, which has experienced relative success. The reason for this innovation and its success can be attributed to the fact that many of the smaller stores utilize wholesalers on a cash and carry basis, purchasing and carrying our products to be stocked in stores themselves.

These owners of the smaller "colmados" and "cafetines" are attracted to the manufacturers' products by the use of point-of-purchase advertisements and display at the wholesale establishment.





A second marketing innovation in Puerto Rico related to the distribution of consumer goods are intermediaries who function essentially as traveling distributors, servicing the smaller stores. These entrepreneurs go directly to the manufacturers outlet or to the large wholesalers, fill up their truck and then sell to the small "colmados" and "cafetines" throughout the island.

Since a good deal of shopping is done in these smaller, individually owned retail outlets as well as the chains, the impact of these "traveling distributors" has been significant, so significant, in fact, that these intermediaries have been segmented as a class of account in reports analyzed by many large marketers in Puerto Rico.

The island of Puerto Rico is a highly developed area as far as marketers are concerned. The tools are certainly available with which the successful passage of goods from manufacturer to consumer can be achieved by those with the proper marketing approach.

For island-wide marketing purposes, Puerto Rico is divided into five Marketing Regions. These are identified by the major city in each region: Arecibo, Caguas, Mayaguez, Ponce and San Juan. Unlike census-defined S.M.S.A.'s or television research-defined ADI's, these regions developed along product distribution and local media coverage patterns.

Map IVC-1 shows the divisions by Marketing Region on the island and the municipalities or "municipios" encompassed by each region.

Of the five Marketing Regions in Puerto Rico, San Juan has by far the largest and most heavily concentrated population on the island. Caguas, the second most populated Marketing Region, has approximately half the population of San Juan in a geographical area more than twice the size of the San Juan Marketing Region.

Table IVC-1 shows the total population estimates for each of the five Marketing Regions of Puerto Rico.

**MAP IV C-1**  
**PUERTO RICO MARKETING REGIONS**

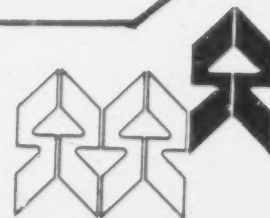


TABLE IV C-1

**PUERTO RICO POPULATION BY  
MARKETING REGION 1980**

| Marketing Region | Population<br>1980<br>(000) |
|------------------|-----------------------------|
| Arecibo          | 505.8                       |
| Caguas           | 671.4                       |
| Mayaguez         | 463.1                       |
| Ponce            | 599.5                       |
| San Juan         | 1,286.4                     |
| Total Island     | 3,526.3                     |

Sources: U. S. Department of Commerce  
U. S. Bureau of the Census  
Census of Population, 1970,  
Puerto Rico Planning Board  
Strategy Research Corporation

**D. Demographic Profile — 1980**

The Commonwealth of Puerto Rico, with an estimated Hispanic population of 3,484,200 as of January 1, 1980, is the fourteeneth largest Spanish "country" in the world. Puerto Rico is one of the most heavily populated areas in the world, with approximately 1,000 people per each of the island's 3,500 square miles.

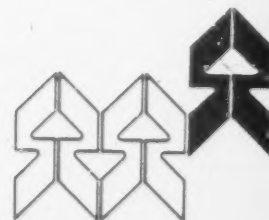


TABLE IV D-1

**PUERTO RICO HISPANIC\* POPULATION  
VERSUS  
OTHER HISPANIC COUNTRIES**

| Country            | Population<br>(000) |
|--------------------|---------------------|
| Mexico             | 48,313.4            |
| Spain              | 33,290.0            |
| Argentina          | 23,983.0            |
| Columbia           | 21,117.0            |
| United States      | 14,974.8            |
| Peru               | 13,586.3            |
| Venezuela          | 10,398.9            |
| Chile              | 8,834.8             |
| Cuba               | 8,553.4             |
| Ecuador            | 6,144.0             |
| Guatemala          | 5,200.0             |
| Bolivia            | 4,804.0             |
| Dominican Republic | 4,011.6             |
| Puerto Rico        | 3,484.2             |
| El Salvador        | 3,418.5             |
| Uruguay            | 2,900.0             |
| Honduras           | 2,495.0             |
| Paraguay           | 2,314.0             |
| Nicaragua          | 1,914.0             |
| Costa Rica         | 1,800.0             |
| Panama             | 1,425.3             |

\*Portugal (pop. 10 mil.) and Brazil (pop. 90 mil.)  
not included in definition of term "Hispanic."

Source: Strategy Research Corporation  
Rand McNally World Atlas

Puerto Rico represents a virtually pure Hispanic market, where Hispanic cultural values are the norm and Spanish is the official language. Of the 3,526,300 people living on the island of Puerto Rico, 98.8% are Hispanic.

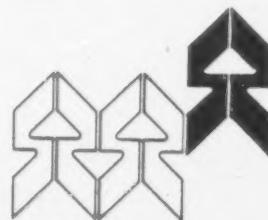


TABLE IV D-2

**1980  
TOTAL POPULATION  
VERSUS  
HISPANIC POPULATION**

| Commonwealth of Puerto Rico |                   |                       |                                        |
|-----------------------------|-------------------|-----------------------|----------------------------------------|
| Total<br>(000)              | Hispanic<br>(000) | Non-Hispanic<br>(000) | Hispanic<br>Percent of<br>Total<br>(%) |
| 3,526.3                     | 3,484.2           | 42.1                  | 98.8%                                  |

Source: Market Statistics Inc.,  
U.S. Department of Commerce,  
U. S. Bureau of the Census,  
Strategy Research Corporation

From 1970 to 1980, the Hispanic population of Puerto Rico grew at a rate three times that of the total U.S. population. While the total population in the United States grew roughly 10%, from 203 million people in 1970 to 223 million today, the Puerto Rico Hispanic population increased 29.8% from 2.7 million in 1970 to 3.5 million in 1980.

TABLE IV D-3

**TOTAL U.S. POPULATION  
VERSUS  
PUERTO RICO HISPANIC POPULATION  
1970 AND 1980**

|                            | 1970<br>(000) | 1980<br>(000) | Increase  |       |
|----------------------------|---------------|---------------|-----------|-------|
|                            |               |               | (000)     | (%)   |
| Total<br>U. S.             | 203,211.9     | 222,688.1     | +19,476.2 | +9.6  |
| Puerto<br>Rico<br>Hispanic | 2,684.7       | 3,484.2       | +799.5    | +29.8 |

Source: Market Statistics Inc.,  
U.S. Department of Commerce,  
U.S. Bureau of the Census  
Strategy Research Corporation

The median age for Hispanics in the Commonwealth of Puerto Rico is approximately four to five years lower than the median age for the non-Hispanic population in the U.S. Median Age for Hispanics on the island is somewhat higher than for "stateside" Hispanics.

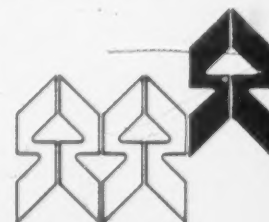


TABLE IV D-4

**COMMONWEALTH OF PUERTO RICO  
AGE/SEX DISTRIBUTION**

|                        | Population<br>(000) | Percent<br>Distribution<br>(%) |
|------------------------|---------------------|--------------------------------|
| <b>Males 18 - 34</b>   | 439.0               | 12.6                           |
| 35 - 49                | 261.3               | 7.5                            |
| 50 - 64                | 212.5               | 6.1                            |
| 65+                    | 94.1                | 2.7                            |
| <b>Females 18 - 34</b> | 505.2               | 14.5                           |
| 35 - 49                | 282.2               | 8.1                            |
| 50 - 64                | 226.5               | 6.5                            |
| 65+                    | 118.5               | 3.4                            |
| <b>Teens 12 - 17</b>   | 449.5               | 12.9                           |
| <b>Children 0 - 11</b> | 895.4               | 25.7                           |
| <b>TOTAL</b>           | <b>3,484.2</b>      | <b>100.0</b>                   |
| <b>Median Age</b>      | <b>24.1 years</b>   |                                |

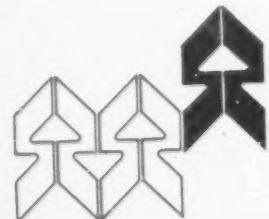
Source: Strategy Research Corporation

The island of Puerto Rico is geographically divided into political regions called municipios, each with its own alcalde or mayor. Table IV D-5 shows the growth in population, by municipio, from 1970 to 1980.

TABLE IV D-5

**POPULATION BY MUNICIPIO  
1970 - 1980**

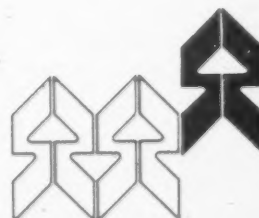
| Municipio | 1970   | 1980   |
|-----------|--------|--------|
| Adjuntas  | 18,691 | 20,500 |
| Aguada    | 25,658 | 30,300 |
| Aguadilla | 51,355 | 61,700 |





| Municipio    | 1970    | 1980    |
|--------------|---------|---------|
| Aguas Buenas | 18,600  | 23,400  |
| Aibonito     | 20,044  | 23,700  |
| Anasco       | 19,416  | 24,500  |
| Arecibo      | 73,468  | 86,600  |
| Arroyo       | 13,033  | 14,000  |
| Barceloneta  | 20,792  | 15,900  |
| Barranquitas | 20,118  | 22,800  |
| Bayamon      | 156,192 | 263,400 |
| Cabo Rojo    | 26,060  | 31,700  |
| Caguas       | 95,661  | 147,200 |
| Camuy        | 19,922  | 23,200  |
| Carolina     | 107,643 | 196,200 |
| Catano       | 26,459  | 30,300  |
| Cayey        | 38,432  | 43,500  |
| Ceiba        | 10,312  | 13,000  |
| Ciales       | 15,595  | 16,200  |
| Cidra        | 23,892  | 29,000  |
| Coamo        | 26,468  | 30,600  |
| Comerio      | 18,819  | 21,400  |
| Corozal      | 24,545  | 28,700  |
| Culebra      | 732     | 1,000   |
| Dorado       | 17,388  | 27,400  |
| Fajardo      | 23,032  | 33,100  |
| Guanica      | 14,889  | 19,100  |
| Guayama      | 36,249  | 42,700  |
| Guayanilla   | 18,144  | 21,500  |
| Guaynabo     | 67,042  | 109,200 |
| Gurabo       | 18,289  | 21,500  |
| Hatillo      | 21,913  | 26,700  |
| Hormigueros  | 10,827  | 18,400  |
| Humacao      | 36,023  | 47,800  |
| Isabela      | 30,430  | 35,800  |
| Jayuya       | 13,588  | 14,300  |
| Juana Diaz   | 36,270  | 45,000  |
| Juncos       | 21,814  | 26,000  |
| Lajas        | 16,545  | 20,400  |
| Lares        | 25,263  | 27,600  |
| Las Marias   | 7,841   | 8,400   |
| Las Piedras  | 18,112  | 22,300  |
| Loiza        | 39,062  | 23,700  |
| Luquillo     | 10,390  | 13,600  |
| Manati       | 30,559  | 37,800  |

(continued on following page)

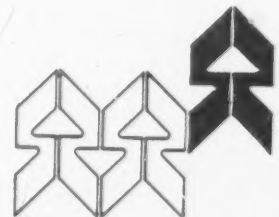




(TABLE IV D-5 continued)

| Municipio     | 1970      | 1980      |
|---------------|-----------|-----------|
| Maricao       | 5,991     | 5,500     |
| Maunabo       | 10,792    | 12,400    |
| Mayaguez      | 85,857    | 103,100   |
| Moca          | 22,361    | 25,500    |
| Morovis       | 19,059    | 22,300    |
| Naguabo       | 17,996    | 21,600    |
| Naranjito     | 19,913    | 24,900    |
| Orocovis      | 20,201    | 18,900    |
| Patillas      | 17,828    | 20,500    |
| Penuelas      | 15,973    | 18,900    |
| Ponce         | 158,981   | 205,000   |
| Quebradillas  | 15,582    | 20,300    |
| Rincon        | 9,094     | 10,900    |
| Rio Grande    | 22,032    | 39,700    |
| Sabana Grande | 16,343    | 19,400    |
| Salinas       | 21,837    | 23,600    |
| San German    | 27,990    | 33,300    |
| San Juan      | 463,242   | 564,000   |
| San Lorenzo   | 27,755    | 31,400    |
| San Sebastian | 30,157    | 34,200    |
| Santa Isabel  | 16,056    | 19,700    |
| Toa Alta      | 18,964    | 24,700    |
| Toa Baja      | 46,384    | 73,600    |
| Trujillo Alto | 30,669    | 49,800    |
| Utuado        | 35,494    | 37,500    |
| Vega Alta     | 22,810    | 33,000    |
| Vega Baja     | 35,327    | 44,700    |
| Vieques       | 7,767     | 9,700     |
| Villaiba      | 18,733    | 22,400    |
| Yabucoa       | 30,165    | 34,400    |
| Yauco         | 35,103    | 40,000    |
| Canovanas     | ---       | 32,000    |
| Florida       | ---       | 8,300     |
| TOTAL         | 2,712,033 | 3,526,300 |

Source: U. S. Department of Commerce, U.S. Bureau of  
Census; Census of Population, 1970,  
Puerto Rico Planning Board; Strategy  
Research Corporation



## E. San Juan

The San Juan metropolitan Area has a population of 1.25 million persons. It ranks 31st among all U.S. Metros, alongside such markets as Phoenix (rank = 28), Buffalo (29), Indianapolis and New Orleans (tied for 33rd rank). Among U.S. mainland Hispanic markets San Juan ranks 3rd, preceded only by Los Angeles and New York. In the last 20 years the population of San Juan has nearly doubled; and this trend is expected to continue.

TABLE IV E-1

**GROWTH IN THE TOTAL  
SAN JUAN METRO POPULATION  
1960 - 1980**

| Year      | Total<br>Population | Percent<br>Change |
|-----------|---------------------|-------------------|
| 1960      | 667,677             | Base              |
| 1970      | 897,631             | +34.4             |
| Est. 1975 | 1,096,600           | +64.2             |
| Est. 1977 | 1,109,600           | +66.2             |
| Est. 1979 | 1,253,400           | +87.7             |
| Est. 1980 | 1,286,900           | +92.7             |

Source: Departamento de Comercio del Estado  
Libre Asociado de Puerto Rico;  
Standard Rate and Data Service,  
Strategy Research Corporation

Population increases have been the result of both Net Natural Increases (births over deaths), and Immigration (migration from other areas of the Island of Puerto Rico, from Cuba and the Dominican Republic, and from the United States — primarily from the New York area). This is due, in part, to familiar language and similar cultural patterns. Among San Juan households, nearly 89% have Puerto Rican heads of household. These heads of household consist primarily of Puerto Ricans and their families who went to the U.S. in the 1950's and 1960's seeking employment opportunities and who have now returned to the burgeoning San Juan economy, finding enhanced employment opportunities in their native land. In addition, there are over 20,000 U.S. Continentals residing in San Juan, and over 70,000 Cubans (some of whom came from the U.S. after leaving Cuba).

The average level of education among household heads in San Juan is 10.8 years. Over one-third of heads of household in the San Juan market have attended college, as shown on Table IV E-2.

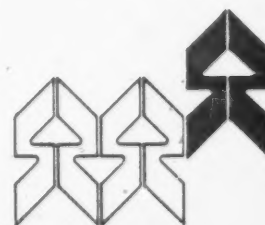


TABLE IV E-2

**LEVEL OF EDUCATION  
OF HEAD OF HOUSEHOLD**

|                                                                                | Percent   |
|--------------------------------------------------------------------------------|-----------|
| No Schooling                                                                   | 1.7       |
| Elementary                                                                     |           |
| 1 - 4                                                                          | 8.7       |
| 5 - 6                                                                          | 4.8       |
| Intermediate                                                                   |           |
| 7 - 8                                                                          | 7.5       |
| 9                                                                              | 2.9       |
| High School                                                                    |           |
| 1 - 2 Years                                                                    | 6.0       |
| 3 - 4 Years                                                                    | 15.6      |
| Graduated                                                                      | 15.4      |
| College                                                                        |           |
| 1 - 3 Years                                                                    | 10.3      |
| 4 Years                                                                        | 5.3       |
| Graduated                                                                      | 14.4      |
| 5 or More Years                                                                | 2.6       |
| Masters—Post Graduate                                                          | 4.1       |
| Don't Know                                                                     | 0.5       |
| Ref/Na.                                                                        | 0.2       |
| Total                                                                          | 100.0     |
| Average Number of School<br>Years Completed (Based<br>on a 9 Month School Year | 10.8 yrs. |

Source: Strategy Research Corporation

Average family income in the San Juan Metro is \$10,169, with 26% of families earning at least \$12,000 per annum. Table IV E-3 shows the distribution of monthly family income by income groupings. If we multiply the average figure by the total number of households in the Metro, we arrive at an annual income for the San Juan market of approximately \$3.2 billion.

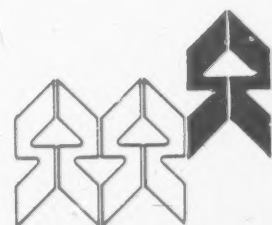


**TABLE IV E-3**  
**MONTHLY FAMILY INCOME**

|                   | Percent  |
|-------------------|----------|
| Less Than \$300   | 14.4     |
| \$300 - \$399     | 11.4     |
| \$400 - \$499     | 16.0     |
| \$500 - \$599     | 7.6      |
| \$600 - \$699     | 9.0      |
| \$700 - \$799     | 7.6      |
| \$800 - \$899     | 3.6      |
| \$900 - \$999     | 3.8      |
| \$1,000 - \$1,199 | 8.1      |
| \$1,200 - \$1,399 | 5.2      |
| \$1,400 - \$1,599 | 3.6      |
| \$1,600 - \$1,799 | 1.9      |
| \$1,800 - \$1,999 | 1.2      |
| \$2,000 - \$2,999 | 2.1      |
| \$3,000 or More   | 4.3      |
| Don't Know        | 0.2      |
| Total             | 100.0    |
| Average Monthly   | \$ 847   |
| Average Yearly    | \$10,169 |

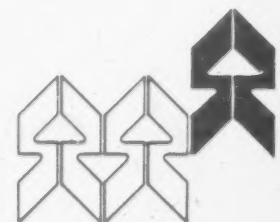
Source: Strategy Research Corporation

Only one person is employed full-time in over 50% of the households in San Juan. Nevertheless, Table IV E-4 shows that in more than a quarter of the San Juan households, two people work full-time.

**TABLE IV E-4**  
**NUMBER OF PERSONS EMPLOYED  
FULL-TIME IN HOUSEHOLD**

|                                                                   | Percent |
|-------------------------------------------------------------------|---------|
| One Person                                                        | 57.4    |
| Two Persons                                                       | 25.8    |
| Three Persons                                                     | 3.1     |
| Four Persons                                                      | 0.6     |
| No One Employed                                                   |         |
| Full-Time                                                         | 13.1    |
| Total                                                             | 100.0   |
| Average Number of<br>Persons Employed Full-<br>Time Per Household | 1.21    |

Source: Strategy Research Corporation



## F. Product Consumption

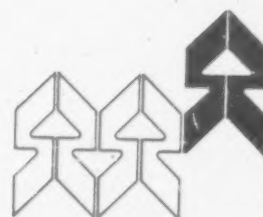
The in-home incidence of a variety of products and product categories was measured for the San Juan, Puerto Rico market. Among the "Food and Beverage" products whose In-home incidence was measured, rice was found in the highest percentage (97.6%) of San Juan households. In the "Health and Beauty Aids" category, deodorants was the number one used product, found in 99.7% of the households surveyed. Liquid detergent was the most used of the "Cleaners and Paper Goods" products, with an In-home incidence of 95.5% in San Juan.

TABLE IV F-4

### HISPANIC INCIDENCE OF PURCHASE SAN JUAN, PUERTO RICO

| Product Category                | In-Home Incidence |
|---------------------------------|-------------------|
| <u>Food &amp; Beverage</u>      |                   |
| Beer                            | 32.2              |
| Cereals                         | 52.2              |
| Dressing (Spoonable)            | 70.1              |
| Ice Cream/Yogurt                | 34.7              |
| Margarine                       | 68.1              |
| Oil Salad/Cooking               | 97.1              |
| Rice                            | 97.6              |
| Soft Drinks                     | 72.6              |
| Soup Cubes                      | 64.8              |
| Tomato Sauce                    | 95.1              |
| <u>Health &amp; Beauty Aids</u> |                   |
| Deodorants                      | 99.7              |
| Facial Tissues                  | 54.9              |
| Shampoo                         | 91.2              |
| <u>Cleaners and Paper Goods</u> |                   |
| Furniture Wax                   | 57.1              |
| Insecticides                    | 83.1              |
| Liquid Detergent                | 95.5              |
| <u>Miscellaneous</u>            |                   |
| Rum                             | 52.3              |
| Scotch Whiskey                  | 38.0              |
| Wine                            | 39.0              |

Source: Strategy Research Corporation



## G. Broadcast Media

If one was to characterize the broadcasting environment of Puerto Rico in one word, that one word would be "competitive." Approximately 100 broadcast stations compete among themselves every day for their share of the 3.5 million population of Puerto Rico. By comparison, Cleveland with a population of 4.0 million has approximately 35 broadcast stations vying for an audience that is one-half million larger.

The 100 broadcast stations in Puerto Rico not only compete for audience; they also compete for advertising budgets that are considered to be smaller than the Puerto Rico audience warrants. Some companies look upon Puerto Rico as part of the domestic market; some see Puerto Rico as part of the international market. In either case, the Puerto Rico market remains generally undervalued.

The Puerto Rico broadcast environment offers a wealth of media, both in variety and number, which the advertiser can use to reach that segment of the Puerto Rican audience in which he is most interested.

# Spanish Format Station Listing

## Radio

### PUERTO RICO

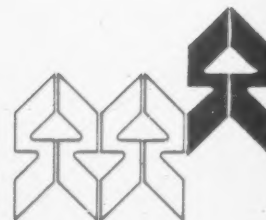
#### Aguada

WRFE-FM 105.5 MHz  
846 Bo. Piedras, Blancos, Aguada 00602  
General Manager: Aureo Matos

WTPM (FM) 92.9 MHz (809) 891-0897  
Box 1629, Mayaguez 00708  
General Manager: Francisco J. Vega

#### Aguadilla

WABA (AM) 850 KHz (809) 891-1230  
Box 188, Aguadilla 00603  
General Manager: Pito Hernandez





WIVA (FM) 100.3 MHz (809) 891-1230  
Box 188, Aguadilla 00603  
General Manager: Pito Hernandez

WUNA (AM) 1340 KHz (809) 891-2312  
Box 1, Aguadilla 00603  
General Manager: Ernesto Hernandez

#### **Arecibo**

WCMN (AM) 1280 KHz (809) 878-0070  
P.O. Box 436, Arecibo 00612  
General Manager: Byron Mitchell

WCMN (FM) 107.3 MHz (809) 878-0070  
P.O. Box 436, Arecibo 00612  
General Manager: Byron Mitchell

WMIA (AM) 1070 KHz  
Box 1055, Arecibo 00612  
General Manager: Epifanio Rodriguez Velez

WNIK (AM) 1230 KHz (809) 878-1366  
Box 908, Arecibo 00612  
General Manager: Pablo Llerandi

WNIK (FM) 106.5 MHz (809) 878-1366  
Box 908, Arecibo 00612  
General Manager: Pablo Llerandi

#### **Barceloneta - Manati**

WBQN (AM) 1160 KHz (809) 846-6155  
Box 11395, Barceloneta 00617  
General Manager: Luis R. Rivera

#### **Bayamon**

WGSX (FM) 94.7 MHz (809) 763-0020  
74 Mayaguez St., San Juan 00917  
General Manager: Carlos M. Pirallo

WLUZ (AM) 1600 KHz (809) 785-1600  
Box 9394, Santurce 00908  
General Manager: Tomas G. Muniz

WXYX (FM) 100.7 MHz (809) 786-4323  
RFD 68A, Carr 831-KM 1.9 - Bo. Minillas  
Bayamon, P.R.  
General Manager: Roberto Davila

#### **Cabo Rojo**

WEKO (AM) 930 KHz (809) 851-1236  
Box 681, Cabo Rojo 00623  
General Manager: David Ortiz

#### **Caguas**

WNEL (AM) 1430 KHz (809) 744-3131  
P.O. Box 487, Caguas 00625  
General Manager: Carmen Pagan

WVJP (AM) 1110 KHz (809) 743-5790  
Box 207, Caguas 00625  
General Manager: Hector Pereira

WVJP (FM) 103.3 MHz (809) 743-5790  
Box 207, Caguas 00625  
General Manager: Hector Pereira

#### **Camuy**

WCHQ (AM) 1360 KHz (809) 898-2510  
Box 458 Camuy 00627  
General Manager: Jose Agustin Arce

WCHQ (FM) 102.9 MHz (809) 898-2510  
Box 459, Camuy 00627  
General Manager: Jose Agustin Arce

#### **Carolina**

WOLA (FM) 107.7 MHz (809) 769-1400  
Villa Fontana Park, Carolina 00630  
General Manager: Pedro Roman Collazo

WVOZ (AM) 1400 KHz (809) 769-4103  
Villa Fontana Park, Carolina 00630  
General Manager: Pedro Roman Collazo

### **Cayey**

WLEY (AM) 1080 KHz (809) 738-2276  
Apartado 1186, Cayey 00633  
General Manager: J.H. Conesa, Jr.

### **Cidra-Caguas**

WBRQ (FM) 97.7 MHz (809) 743-8260  
Post Office Box 2, Cidra 00639  
General Manager: Tomas Carrasquillo

### **Coamo**

WCPR (AM) 1450 KHz (809) 825-1095  
Box 316, Coamo 00640  
General Manager: Jose David Soler

### **Corozal**

WORO (FM) 92.5 MHz (809) 767-3500  
Box 415, Hato Rey 00919  
General Manager: Jose Arturo Fernandez

### **Culebra**

WZVS (FM) 98.9 MHz (809) 723-5814  
Box 237, Culebra 00645  
General Manager: Jose Carlos Colon

### **Fajardo**

WDOY (FM) 96.5 MHz (809) 863-0202  
Box 948, Fajardo 00648  
General Manager: Richard J. Friedman

WMDD (AM) 1480 KHz (809) 863-0202  
Box 948, Fajardo 00648  
General Manager: Richard J. Friedman

### **Guayama**

WXRF (AM) 1590 KHz (809) 864-2320  
Box 600, Guayama 00654  
General Manager: Jose Raul Fuster

WXRF (FM) 106.9 MHz (809) 864-2320  
Box 600, Guayama 00654  
General Manager: Jose Raul Fuster

### **Hormigueros**

WGIT (FM) 92.1 MHz (809) 769-4100  
c/o Radio Voz, Villa Fontana Park, Carolina 00630  
General Manager: Pedro Roman Collazo  
Not on air yet

### **Humacao**

WALO (AM) 1240 KHz (809) 852-1240  
Box C, Humacao 00661  
General Manager: Efrain Archilla

### **Isabela**

WISA (AM) 1390 KHz (809) 872-2680  
Box W, Isabela 00662  
General Manager: Samuel Rodriguez Cintron

WKSA (FM) 101.5 MHz (809) 872-2680  
Box W, Isabela 00662  
General Manager: Samuel Rodriguez Cintron

### **Juana Diaz**

WCGB (AM) 1050 KHz (809) 837-2440  
Apartado 248, Juana Diaz 00665  
General Manager: Melvin Rivera

### **Juncos**

WFAB (AM) 1460 KHz (809) 734-8060  
Box WW, Juncos 00666  
General Manager: Ramon A. Rodriguez

### **Luquillo**

WZOL (FM) 92.1 MHz  
Box 10547, Caparra Heights 00922  
General Manager: Carlos Rivera

### **Manati**

WMLD (FM) 96.9 MHz (809) 854-2225  
Box 6, Manati 00701  
General Manager: Jose A. Rivas

WMNT (AM) 1500 KHz (809) 854-2225  
Box 6, Manati 00701  
General Manager: Jose A. Rivas

### **Maricao**

WAEL (FM) 96.1 MHz (809) 832-4560  
Apartado Postal AE, Mayaguez 00708  
General Manager: Ginette Marie Pirallo

### **Mayaguez**

WAEL (AM) 600 KHz (809) 832-0600  
Apartado Postal AE, Mayaguez 00708  
General Manager: Ginette Marie Pirallo

WIOA (FM) 97.5 MHz (809) 832-1150  
Box 43, Mayaguez, 00708  
Chief of Operations: Glenn A. Tryon

WKJB (AM) 710 KHz (809) 832-4160  
P.O. Box 1293, Mayaguez 00708  
General Manager: Johnny Serrano

WKJB (FM) 99.1 MHz (809) 832-4160  
P.O. Box 1293, Mayaguez 00708  
General Manager: Johnny Serrano

WORA (AM) 760 KHz (809) 832-1150  
Box 43, Mayaguez 00708  
Chief of Operations: Glenn A. Tryon

WOYE (FM) 94.1 MHz (809) 833-0094  
P.O. Box 1718, Mayaguez 00708  
Station Manager: Felix A. Bonnet Jr.

WPRA (AM) 990 KHz (809) 832-3020  
Box 1869, Mayaguez 00708  
General Manager: Ederlinda C. de Tamayo

WTIL (AM) 1300 KHz (809) 832-1290  
Box 1360, Mayaguez 00708  
General Manager: Gilbert Mamery

### **Orocovis**

WKCK (AM) 1470 KHz  
Box 1210, Orocovis 00720  
President: Luis Rodriguez Bou

### **Penuelas**

WENA (AM) 1330 KHz (809) 836-1330  
Box 1339, Penuelas 00724  
General Manager: Nephtali Rodriguez

WPPC (AM) 1570 KHz  
Box 350, Ponce 00731  
General Manager: Eric Gonzalez

### **Ponce**

WEUC (AM) 1420 KHz (809) 842-8046  
Box 529, Sta. 6, Ponce 00731  
General Manager: Marcos Pancorvo

WIOC (FM) 105.1 MHz (809) 842-0166  
Box 430, Ponce 00731  
Chief of Operations: Glenn A. Tryon

WISO (AM) 1360 KHz (809) 842-4124  
P.O. Box 2023, Ponce 00732  
General Manager: Luis E. Freyre

WLEO (AM) 1170 KHz (809) 842-3038  
Box 7213, Ponce 00731  
General Manager: Julio H. Conesa, Jr.

WOKI (FM) 93.3 MHz (809) 842-3260  
Box 7243, Ponce 00731  
General Manager: Alfonso Gimenez Porrata

WPAB (AM) 550 KHz (809) 842-3260  
P.O. Box 7243, Ponce 00731  
General Manager: Alfonso Gimenez Porrata

WPRP (AM) 910 KHz (809) 842-0166  
Box 430, Ponce 00731  
Chief of Operations: Glenn A. Tryon

WZAR (FM) 101.9 MHz (809) 842-3038  
Box 7213, Ponce 00731  
General Manager: Julio H. Conesa, Jr.

WZBS (AM) 1490 KHz (809) 844-1490  
P.O. Box 7612, Ponce 00731  
General Manager: Humberto Zayas Chardon

### **Quebradillas**

WREI (FM) 98.3 MHz (809) 895-2725  
Box W, Quebradillas 00742  
General Manager: Jose Arzuaga

### **Salinas**

WHYO (AM) 1210 KHz (809) 824-3420  
P.O. Box H, Salinas 00751  
General Manager: Johnny Ortiz

### **San German**

WBOZ (AM) 1090 KHz  
Villa Fontana Park, Carolina 00630  
President: Pedro Roman Collazo

WRPC (FM) 95.1 MHz (809) 890-3030  
Box 1860, Mayaguez 00708  
General Manager: Ederlinda C. Tamargo

### **San Juan**

WAPA (AM) 680 KHz (809) 724-3000  
Box 4563, San Juan 00905  
General Manager: Ray Owen

WBMJ (AM) 1190 KHz (809) 724-1190  
Hotel Gran Bahia, PH #1, Miramar 00907  
General Manager: June Bennett

WFID (FM) 95.7 MHz (809) 767-7018  
Box 20079, Rio Piedras 00928  
General Manager: Jose Julian Acosta

WHOA (AM) 870 KHz (809) 756-8700  
Box V, Hato Rey 00919  
General Manager: Carmina Mendez

WIAC (AM) 760 KHz (809) 724-0730  
Box 4504, San Juan 00905  
General Manager: Luis Alan Mejia

WIAC (FM) 102.5 MHz (809) 724-0730  
Box 4504, San Juan 00905  
General Manager: Luis A. Mejia

WIOB (FM) 99.9 MHz (809) 725-4020  
Box 13427, Santurce 00908  
Station Manager: Sebastian Robiou

WKAQ (AM) 580 KHz (809) 764-0058  
Box 4668, San Juan 00936  
General Manager: Huberto Biaggi

WKAQ (FM) 104.7 MHz (809) 764-0058  
Box 4668, San Juan 00936  
General Manager: Huberto Biaggi

WKVM (AM) 810 KHz (809) 722-0151  
Box 4189, San Juan 00905  
General Manager: Pedro Miranda

WKVM (FM) 105.7 MHz (809) 724-1950  
Box 4189, San Juan 00905  
General Manager: Pedro Miranda

WOSO (AM) 1030 KHz (809) 724-4242  
Box 4349, San Juan 00905  
General Manager: Augustine L. Cavallaro

WPRM (FM) 98.5 MHz (809) 744-3131  
P.O. Box 5725, San Juan 00906  
General Manager: Carmen Pagan

WQBS (AM) 630 KHz (809) 725-4020  
Box 13427, Santurce 00908  
Resident Manager: Sebastian Robiou

WQII (AM) 1140 KHz (809) 790-5001  
Box 71398, San Juan 00936  
General Manager: Julio M. Toro

WRAI (AM) 1520 KHz (809) 763-0020  
74 Mayaguez St., San Juan 00917  
General Manager: Carlos M. Pirallo

WRSJ (AM) 1560 KHz (809) 782-6398  
Box 1560, Bayamon 00610  
President: Paul Hernandez, Jr.

WUNO (AM) 1320 KHz (809) 765-4720  
P.O. Box Q, Hato Rey 00919  
General Manager: Reinaldo Royo



WZNT (FM) 93.7 MHz (809) 790-5001  
G.P.O. Box 71398, San Juan 00936  
General Manager: Julio M. Toro

WFBA (AM) 1460 KHz (809) 896-1005  
P.O. Box CC, San Sebastian 00755  
General Manager: Felix Bonnet-Velez

#### Utua

WERR (FM) 104.1 MHz (809) 894-2460  
Box 8480, Santurce 00910  
General Manager: Bob Rodriguez

WU?R (AM) 1530 KHz (809) 894-2460  
P.O. Box 868, Utua 00961  
General Manager: Benito Martinez

#### Vega Baja

WEGA (AM) 1350 KHz (809) 858-2575  
Box 1488, Vega Baja 00736  
General Manager: Angel Manuel Ciordia, Jr.

#### Yabucoa

WXEW (AM) 840 KHz (809) 893-3065  
Box 42, Yabucoa 00767  
General Manager: Victoria Vargas

#### Yauco

WKFE (AM) 1550 KHz (809) 856-1320  
P.O. Box 324, Yauco 00768  
General Manager: Julio H. Conesa, Jr.

## Television

### PUERTO RICO

#### Aguadilla

WOLE-TV (Cadena Telemundo) Ch. 12  
Box AQ, Mayaguez 00708 (809) 833-1200  
General Manager: Amadeo Nazario

WVEO-TV (Telecadena Perez Perry) Ch. 44  
Box W, Aguadilla 00603 (809) 833-1287  
General Manager: Hector Nicolau

#### Caguas

WKBM-TV (Telecadena Perez Perry) Ch. 11  
P.O. Box S-4189, San Juan 00905 (809) 723-8040  
General Manager: Eleuterio Vega

#### Mayaguez

WIPM-TV (PBS) Ch. 3 (809) 832-0164  
Box 449, Mayaguez 00708  
General Manager: Elsie Calero

WORA-TV (WAPA) Ch. 5 (809) 832-1150  
Box 43, Mayaguez 00708  
Chief of Operations: Glenn A. Tryon

#### Ponce

WLUZ-TV (Ind.) Ch. 7 (809) 843-0820  
Box A, San Juan 00902  
General Manager: Enrique Rubiano

WSUR-TV (Telecadena Perez Perry) Ch. 9  
G.P.O. Box 471, Ponce 00732  
(809) 842-4178  
General Manager: Eleuterio Vega

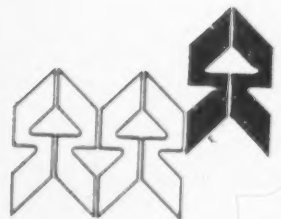
#### San Juan

WAPA-TV (WAPA) Ch. 4 (809) 792-4444  
P.O. Box 2020, San Juan 00936  
General Manager: Richard Moore

WIPR-TV (PBS) Ch. 6 (809) 763-3666  
Box 909, Hato Rey 00919  
General Manager: Elsie Calero

WKAQ-TV (Cadena Telemundo) Ch. 6  
Box w, San Juan 00936 (809) 764-0202  
General Manager: Rafael Ruiz

## **V. CONSUMER CHARACTERISTICS**





## V. Consumer Characteristics

The projected gross income for U.S. Hispanics in 1980 is \$51.8 billion. A large part of this \$51.8 billion will be spent by the Hispanic family on groceries as research indicates that the Hispanic family spends almost one fourth more of its income in grocery stores than does the non-Hispanic family. The average Hispanic family also consumes more than the non-Hispanic family for packaged goods. Most Hispanic consumer purchases are in the areas of food, beverage and clothing, with an emphasis on high quality items.

The Hispanic family spends more of its disposable income on well-known advertised brands than the non-Hispanic family, demonstrating considerable brand loyalty as a consumer group. Given the importance of the family in the Hispanic culture, it should not be surprising to find that the Hispanic places product reputation and quality ahead of price.

Most Hispanic food store shopping is done in major supermarkets. Many of the major supermarket chains maintain outlets in Hispanic areas and actively cater to the Hispanic trade. However, while most Hispanic shoppers do use major supermarkets as their primary food stores, "bodegas" (small neighborhood grocer stores) serve as secondary stores and are quite important in distribution. Additional small neighborhood stores, such as Hispanic butcher shops and bakeries, supplement the primary stores.

Hispanic shopping patterns are conditioned by the need for feeling culturally welcome, by the store personnel and by the products offered. The buying habits of the Hispanic in terms of brand preference are substantially influenced by the importance that the advertiser places on addressing the Hispanic.

### A. Consumption Indices

This section presents Usage Incidences for a wide array of products in four major Hispanic markets; New York, Los Angeles, Miami and San Antonio. Household usage incidence is included for total market, Spanish, and non-Spanish. Additionally, a Spanish/non-Spanish usage index is shown. An index of 100 indicates that Spanish percent incidence and non-Spanish percent incidence were identical. An index above 100 indicates incidence among Hispanic households was higher than non-Spanish households.

#### 1. New York

In the New York area, many food and beverage products were found to index higher for the Hispanic population. These products include baby food, beer, white bread, chewing gum, ground coffee, canned fruit and fruit nectar, malt liquor, spaghetti, canned tomato sauce and canned vegetables.

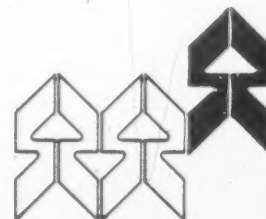
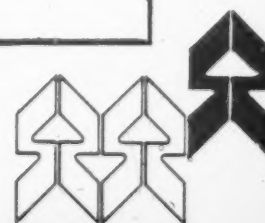


TABLE VA-1a

# HISPANIC FOOD AND BEVERAGE CONSUMPTION—NEW YORK

| Product                                | Percent of Households<br>Using Product |         |                 | Use<br>Index                     |
|----------------------------------------|----------------------------------------|---------|-----------------|----------------------------------|
|                                        | Total<br>Market                        | Spanish | Non-<br>Spanish | Spanish<br>To<br>Non-<br>Spanish |
| Baby Food                              | 11.6                                   | 18.9    | 9.3             | 203.2                            |
| Beer                                   | 50.2                                   | 62.3    | 46.4            | 134.3                            |
| Bread - White                          | 85.8                                   | 93.4    | 83.5            | 111.9                            |
| Cereal - Cold                          | 83.8                                   | 85.5    | 83.2            | 102.8                            |
| Cheese - Sliced/Packaged               | 93.0                                   | 91.1    | 93.6            | 97.3                             |
| Chewing Gum                            | 67.3                                   | 74.7    | 64.8            | 115.3                            |
| Coffee - Decaffeinated                 | 41.3                                   | 27.3    | 45.4            | 60.1                             |
| Coffee - Freeze-Dried/Instant          | 51.7                                   | 43.6    | 54.1            | 80.6                             |
| Coffee - Ground                        | 75.9                                   | 87.2    | 72.2            | 120.7                            |
| Frozen Dinners - Main Course           | 26.8                                   | 23.9    | 27.7            | 86.3                             |
| Fruit - Canned                         | 76.5                                   | 84.1    | 74.2            | 113.3                            |
| Fruit Nectar                           | 29.2                                   | 66.5    | 17.7            | 375.7                            |
| Fruit-Type Drinks - Non Powdered       | 60.7                                   | 78.3    | 55.1            | 142.1                            |
| Juices - Frozen                        | 70.7                                   | 77.5    | 68.4            | 113.3                            |
| Lunch Meat/Cold Cuts - Packaged        | 48.3                                   | 42.3    | 49.9            | 84.8                             |
| Malt Liquor                            | 8.7                                    | 14.9    | 6.6             | 225.8                            |
| Margarine                              | 84.5                                   | 94.2    | 81.6            | 115.4                            |
| Mayonnaise                             | 94.6                                   | 92.4    | 95.2            | 97.1                             |
| Oil - Salad/Cooking                    | 95.4                                   | 96.4    | 94.9            | 101.6                            |
| Pastries - Frozen                      | 31.4                                   | 33.1    | 30.7            | 107.8                            |
| Pet Food - Cat                         | 10.4                                   | 8.0     | 11.1            | 72.1                             |
| Pet Food - Dog                         | 17.6                                   | 8.1     | 20.5            | 39.5                             |
| Powdered Breakfast or Children's Drink | 30.9                                   | 48.0    | 25.4            | 189.0                            |
| Rice - Natural (Short & Long Grain)    | 94.6                                   | 99.7    | 92.9            | 107.3                            |
| Salad Dressing Prepared                | 63.7                                   | 42.6    | 70.4            | 60.5                             |
| Snacks - Chips, Pretzels, etc.         | 71.2                                   | 73.0    | 70.5            | 103.6                            |
| Soft Drinks - Diet                     | 44.6                                   | 21.2    | 51.8            | 40.9                             |
| Soft Drinks - Regular                  | 77.7                                   | 92.6    | 73.2            | 126.5                            |
| Soup                                   | 80.0                                   | 85.2    | 78.2            | 109.0                            |
| Spaghetti - Canned                     | 23.3                                   | 57.9    | 12.7            | 455.9                            |
| Spaghetti - Dry                        | 90.1                                   | 92.9    | 89.2            | 104.2                            |
| Spaghetti - Prepared                   | 50.3                                   | 65.1    | 45.8            | 142.1                            |
| Tomato Paste - Canned                  | 65.2                                   | 68.7    | 64.0            | 107.3                            |
| Tomato Sauce - Canned                  | 81.7                                   | 92.4    | 78.5            | 117.7                            |
| Tuna - Canned                          | 92.3                                   | 79.7    | 95.9            | 83.1                             |
| Vegetables - Canned                    | 73.3                                   | 79.7    | 71.2            | 111.9                            |
| Vegetables - Frozen                    | 72.5                                   | 45.4    | 80.9            | 56.1                             |
| Yogurt                                 | 49.8                                   | 40.3    | 52.6            | 76.6                             |

Source: Strategy Research Corporation



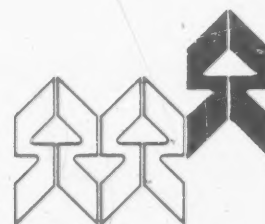
Among the Health and Beauty Aids products surveyed, hair conditioning and hair coloring had the highest Use Index for Hispanics in the New York area. Indigestion and upset stomach remedies, mouthwash and baby oil are also more likely to be found in a Hispanic home than a non-Hispanic home in New York.

TABLE VA-1b

**HISPANIC HEALTH & BEAUTY AIDS  
CONSUMPTION—NEW YORK**

| Product                                | Percent of Households<br>Using Product |         |                 | Use<br>Index                     |
|----------------------------------------|----------------------------------------|---------|-----------------|----------------------------------|
|                                        | Total<br>Market                        | Spanish | Non-<br>Spanish | Spanish<br>To<br>Non-<br>Spanish |
| Baby Oil                               | 34.5                                   | 38.0    | 33.4            | 113.8                            |
| Baby Powder                            | 56.4                                   | 34.4    | 63.0            | 54.6                             |
| Deodorants                             | 92.0                                   | 98.6    | 89.9            | 109.7                            |
| Facial/Eye Make-up                     | 67.5                                   | 71.4    | 66.2            | 107.9                            |
| Hair Coloring                          | 34.6                                   | 44.8    | 31.4            | 142.7                            |
| Hair Conditioner                       | 54.0                                   | 72.2    | 48.4            | 149.2                            |
| Hair Spray                             | 50.6                                   | 44.1    | 52.5            | 84.0                             |
| Headache Remedies                      | 90.1                                   | 93.7    | 88.8            | 105.5                            |
| Indigestion and Upset Stomach Remedies | 78.4                                   | 92.7    | 74.0            | 125.3                            |
| Mouthwash                              | 79.4                                   | 89.9    | 76.0            | 118.3                            |
| Shampoo                                | 95.3                                   | 97.8    | 94.6            | 103.4                            |
| Toothpaste                             | 98.7                                   | 99.7    | 98.3            | 101.4                            |

Source: Strategy Research Corporation



Among "Cleaners and Paper Goods" products, floor wax/cleaners, insecticides and pine oil disinfectants were most heavily used by New York Hispanics.

**TABLE VA-1c**  
**HISPANIC CLEANERS & PAPER GOODS**  
**CONSUMPTION—NEW YORK**

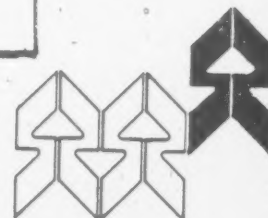
| Product                   | Percent of Households<br>Using Product |         |                 | Use<br>Index                     |
|---------------------------|----------------------------------------|---------|-----------------|----------------------------------|
|                           | Total<br>Market                        | Spanish | Non-<br>Spanish | Spanish<br>To<br>Non-<br>Spanish |
| Bar Soap                  | 98.5                                   | 94.0    | 100.0           | 94.0                             |
| Dishwashing Detergent     | 89.6                                   | 97.8    | 86.9            | 112.5                            |
| Drain Openers             | 50.9                                   | 50.9    | 50.8            | 100.2                            |
| Floor Wax/Cleaners        | 47.6                                   | 65.2    | 42.1            | 154.9                            |
| Furniture Wax             | 83.9                                   | 72.1    | 87.2            | 82.7                             |
| Insecticides              | 64.6                                   | 85.2    | 58.2            | 146.4                            |
| Laundry Detergent         | 99.2                                   | 100.0   | 98.9            | 101.1                            |
| Liquid Household Cleaners | 93.9                                   | 92.9    | 94.2            | 98.6                             |
| Oven Cleaners             | 77.3                                   | 82.7    | 75.5            | 109.5                            |
| Paper Towels              | 95.8                                   | 98.0    | 94.9            | 103.3                            |
| Pine Oil Disinfectants    | 64.4                                   | 92.4    | 55.6            | 166.2                            |
| Room Deodorizers          | 76.5                                   | 83.0    | 74.4            | 111.6                            |
| Sandwich Bags - Plastic   | 60.2                                   | 49.7    | 63.2            | 78.6                             |
| Scouring Powder           | 98.3                                   | 98.0    | 98.3            | 99.7                             |
| Toilet Tissue             | 100.0                                  | 100.0   | 100.0           | 100.0                            |

Source: Strategy Research Corporation

**TABLE VA-1d**  
**HISPANIC MISCELLANEOUS**  
**CONSUMPTION—NEW YORK**

| Product            | Percent of Households<br>Using Product |         |                 | Use<br>Index                     |
|--------------------|----------------------------------------|---------|-----------------|----------------------------------|
|                    | Total<br>Market                        | Spanish | Non-<br>Spanish | Spanish<br>To<br>Non-<br>Spanish |
| After Shave Lotion | 67.5                                   | 69.0    | 67.1            | 102.8                            |
| Automobile Tires   | 36.9                                   | 17.3    | 42.7            | 40.5                             |
| Camera             | 79.3                                   | 67.0    | 83.1            | 80.6                             |
| Razor Blades       | 74.7                                   | 75.6    | 74.4            | 101.6                            |
| Shaving Cream      | 70.0                                   | 67.6    | 70.6            | 95.8                             |
| Television Set     | 98.2                                   | 96.9    | 98.6            | 98.3                             |
| Watches            | 90.3                                   | 85.5    | 91.5            | 93.4                             |

Source: Strategy Research Corporation



## 2. Los Angeles

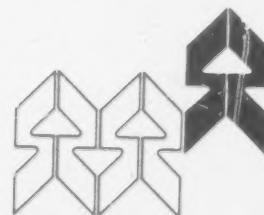
Beverages such as fruit nectar are extremely popular among Hispanics, especially in the Los Angeles market. The Spanish to non-Spanish use Index here was 396.6.

Non-powdered fruit type drinks have an Index of 166.8 in the Los Angeles market. Powdered breakfast or children's drinks have an Index of 166.4.

TABLE VA-2a

### HISPANIC FOOD & BEVERAGE USE CONSUMPTION—LOS ANGELES

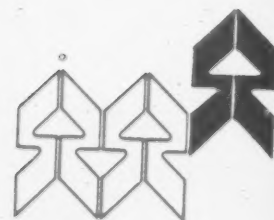
| Product                          | Percent of Households<br>Using Product |         |                 | Use<br>Index                     |
|----------------------------------|----------------------------------------|---------|-----------------|----------------------------------|
|                                  | Total<br>Market                        | Spanish | Non-<br>Spanish | Spanish<br>To<br>Non-<br>Spanish |
| Baby Food                        | 11.4                                   | 18.1    | 7.9             | 229.1                            |
| Beer                             | 55.6                                   | 68.8    | 52.9            | 130.1                            |
| Bread - White                    | 68.2                                   | 90.6    | 63.7            | 142.2                            |
| Cereal - Cold                    | 85.6                                   | 85.6    | 85.6            | 100.0                            |
| Cheese - Sliced/Packaged         | 92.4                                   | 84.9    | 93.9            | 90.4                             |
| Chewing Gum                      | 62.7                                   | 81.1    | 59.1            | 137.2                            |
| Coffee - Decaffeinated           | 42.0                                   | 33.7    | 43.6            | 77.3                             |
| Coffee - Freeze-Dried/Instant    | 50.9                                   | 62.2    | 48.6            | 128.0                            |
| Coffee - American-Type Ground    | 61.7                                   | 49.8    | 63.9            | 77.9                             |
| Coffee - Latin-Type Ground       | 23.4                                   | 23.4    | 0.0             | NA                               |
| Frozen Dinners - Main Course     | 35.1                                   | 39.1    | 34.3            | 114.0                            |
| Fruit - Canned                   | 75.1                                   | 80.5    | 73.9            | 108.9                            |
| Fruit Nectar                     | 26.4                                   | 70.2    | 17.7            | 396.6                            |
| Fruit-Type Drinks - Non-Powdered | 51.4                                   | 76.9    | 46.1            | 166.8                            |
| Juices - Frozen                  | 74.4                                   | 56.2    | 77.9            | 72.1                             |
| Lunch Meat/Cold Cuts - Packaged  | 72.0                                   | 77.2    | 70.9            | 108.9                            |





| Product                                | Percent of Households<br>Using Product |         |                 | Use<br>Index                     |
|----------------------------------------|----------------------------------------|---------|-----------------|----------------------------------|
|                                        | Total<br>Market                        | Spanish | Non-<br>Spanish | Spanish<br>To<br>Non-<br>Spanish |
| Malt Liquor                            | 6.2                                    | 12.0    | 4.9             | 244.9                            |
| Margarine                              | 87.0                                   | 91.2    | 85.9            | 106.2                            |
| Mayonnaise                             | 92.4                                   | 87.8    | 93.3            | 94.1                             |
| Oil - Salad/Cooking                    | 94.3                                   | 84.5    | 96.3            | 87.7                             |
| Pastries - Frozen                      | 30.8                                   | 35.9    | 29.6            | 121.3                            |
| Pet Food - Cat                         | 25.4                                   | 10.3    | 28.3            | 36.4                             |
| Pet Food - Dog                         | 46.3                                   | 18.7    | 51.8            | 36.1                             |
| Powdered Breakfast or Children's Drink | 31.4                                   | 47.0    | 28.3            | 166.4                            |
| Rice - Neutral (Short & Long Grain)    | 86.2                                   | 96.6    | 83.9            | 115.1                            |
| Salad Dressing Prepared                | 77.8                                   | 62.9    | 80.6            | 78.0                             |
| Snacks - Chips, Pretzels, etc.         | 69.2                                   | 72.4    | 68.6            | 105.5                            |
| Soft Drinks - Diet                     | 46.6                                   | 24.4    | 50.9            | 47.9                             |
| Soft Drinks - Regular                  | 62.9                                   | 87.5    | 57.9            | 151.1                            |
| Soup                                   | 88.9                                   | 91.2    | 87.3            | 104.5                            |
| Spaghetti - Canned                     | 21.0                                   | 40.4    | 16.9            | 239.1                            |
| Spaghetti - Dry                        | 88.2                                   | 92.6    | 87.3            | 106.1                            |
| Spaghetti - Prepared                   | 43.2                                   | 53.3    | 41.3            | 129.1                            |

Source: Strategy Research Corporation



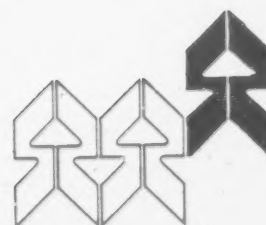


In health and beauty aids, the use of mouthwash and indigestion and upset stomach remedies is more prevalent in Hispanic households in the Los Angeles market.

**TABLE VA-2b**  
**HISPANIC HEALTH & BEAUTY AIDS**  
**CONSUMPTION—LOS ANGELES**

| Product                                | Percent of Households<br>Using Product |         |                 | Use<br>Index                     |
|----------------------------------------|----------------------------------------|---------|-----------------|----------------------------------|
|                                        | Total<br>Market                        | Spanish | Non-<br>Spanish | Spanish<br>To<br>Non-<br>Spanish |
| Baby Oil                               | 32.9                                   | 37.5    | 31.9            | 117.6                            |
| Baby Powder                            | 30.4                                   | 35.2    | 29.3            | 120.1                            |
| Deodorants                             | 92.6                                   | 95.2    | 91.9            | 103.6                            |
| Facial/Eye Make-Up                     | 69.6                                   | 71.4    | 69.3            | 103.0                            |
| Hair Coloring                          | 29.8                                   | 33.8    | 28.9            | 117.0                            |
| Hair Conditioner                       | 50.9                                   | 45.2    | 51.9            | 87.1                             |
| Hair Spray                             | 49.5                                   | 46.9    | 49.9            | 94.0                             |
| Headache Remedies                      | 87.4                                   | 92.9    | 86.3            | 107.6                            |
| Indigestion and Upset Stomach Remedies | 72.2                                   | 92.6    | 67.9            | 136.4                            |
| Mouthwash                              | 75.1                                   | 91.9    | 71.6            | 128.4                            |
| Shampoo                                | 92.5                                   | 96.9    | 91.6            | 105.8                            |
| Toothpaste                             | 98.5                                   | 99.6    | 98.3            | 101.3                            |

Source: Strategy Research Corporation



The Los Angeles market also shows a high Hispanic use of pine oil disinfectants (180.9). Floor waxes and cleaners register a Use Index of 134.5. Room deodorizers have a Use Index of 123.6.

**TABLE VA-2c**  
**HISPANIC CLEANER & PAPER GOODS**  
**CONSUMPTION—LOS ANGELES**

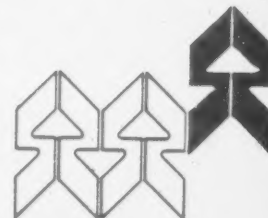
| Product                   | Percent of Households<br>Using Product |         |                 | Use<br>Index                     |
|---------------------------|----------------------------------------|---------|-----------------|----------------------------------|
|                           | Total<br>Market                        | Spanish | Non-<br>Spanish | Spanish<br>To<br>Non-<br>Spanish |
| Bar Soap                  | 99.0                                   | 99.3    | 98.9            | 100.4                            |
| Dishwashing Detergent     | 94.1                                   | 97.6    | 93.3            | 104.6                            |
| Drain Openers             | 51.4                                   | 52.3    | 51.3            | 101.9                            |
| Floor Wax/Cleaners        | 54.7                                   | 69.4    | 51.6            | 134.5                            |
| Furniture Wax             | 83.5                                   | 74.1    | 85.3            | 86.9                             |
| Insecticides              | 56.2                                   | 63.0    | 54.9            | 114.8                            |
| Laundry Detergent         | 97.7                                   | 100.0   | 97.3            | 102.8                            |
| Liquid Household Cleaners | 90.5                                   | 82.2    | 91.9            | 89.4                             |
| Oven Cleaners             | 70.6                                   | 68.1    | 70.9            | 96.1                             |
| Paper Towels              | 95.2                                   | 87.2    | 96.6            | 90.3                             |
| Pine Oil Disinfectants    | 56.0                                   | 89.2    | 49.3            | 180.9                            |
| Room Deodorizers          | 58.1                                   | 69.1    | 55.9            | 123.6                            |
| Sandwich Bags - Plastic   | 76.2                                   | 60.3    | 79.3            | 76.0                             |
| Scouring Powder           | 97.8                                   | 96.9    | 97.9            | 99.0                             |
| Toilet Tissue             | 100.0                                  | 100.0   | 100.0           | 100.0                            |

Source: Strategy Research Corporation

**TABLE VA-2d**  
**HISPANIC MISCELLANEOUS**  
**CONSUMPTION—LOS ANGELES**

| Product                     | Percent of Households<br>Using Product |         |                 | Use<br>Index                     |
|-----------------------------|----------------------------------------|---------|-----------------|----------------------------------|
|                             | Total<br>Market                        | Spanish | Non-<br>Spanish | Spanish<br>To<br>Non-<br>Spanish |
| After Shave Lotion          | 67.4                                   | 80.4    | 64.7            | 124.3                            |
| Automobile Tires            | 71.6                                   | 51.3    | 75.6            | 67.9                             |
| Camera                      | 85.7                                   | 52.6    | 92.3            | 57.0                             |
| Radio (Including Car Radio) | 98.9                                   | 96.6    | 99.3            | 97.3                             |
| Razor Blades                | 70.2                                   | 78.7    | 68.5            | 114.9                            |
| Shaving Cream               | 59.7                                   | 76.0    | 56.2            | 135.2                            |
| Television Set              | 99.2                                   | 96.9    | 99.6            | 97.3                             |
| Watches                     | 90.5                                   | 84.8    | 91.6            | 92.6                             |

Source: Strategy Research Corporation



### 3. San Antonio

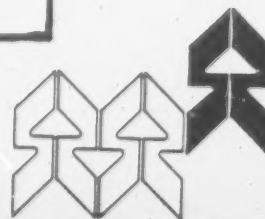
In food and beverage products, standout items in terms of relative use by Hispanic households in San Antonio include baby food, fruit-type drinks, and malt liquor. Fruit nectar, although it has a high Use Index of 157.1, ranks lower on this indicator when compared with New York, Miami and Los Angeles. On the other hand, the malt liquor Index is highest in San Antonio, compared to the other cities. Regular soft drinks win hands down over diet soft drinks (129.4 and 44.4 Indexes, respectively). White bread and packaged lunch meats are also somewhat more likely to be used in Latin households than in non-Latin households.

TABLE VA-3a

#### HISPANIC FOOD AND BEVERAGE USE CONSUMPTION—SAN ANTONIO

| Product                                    | Percent of Households<br>Using Product |         |                 | Use<br>Index                     |
|--------------------------------------------|----------------------------------------|---------|-----------------|----------------------------------|
|                                            | Total<br>Market                        | Spanish | Non-<br>Spanish | Spanish<br>To<br>Non-<br>Spanish |
| Baby Food - Jar                            | 6.5                                    | 9.0     | 4.0             | 225.0                            |
| Beer                                       | 53.0                                   | 47.0    | 59.0            | 79.7                             |
| Bread - White                              | 90.0                                   | 95.0    | 85.0            | 111.8                            |
| Cereal - Cold                              | 84.5                                   | 86.0    | 83.0            | 103.6                            |
| Chewing Gum                                | 70.0                                   | 75.0    | 65.0            | 115.4                            |
| Coffee - Freeze Dried/Instant              | 46.5                                   | 56.0    | 37.0            | 151.4                            |
| Coffee - Ground                            | 62.0                                   | 56.0    | 68.0            | 82.4                             |
| Frozen Dinners                             | 23.0                                   | 20.0    | 26.0            | 76.9                             |
| Frozen Juices                              | 68.0                                   | 56.0    | 80.0            | 70.0                             |
| Fruit - Canned                             | 85.0                                   | 79.0    | 91.0            | 86.8                             |
| Fruit Nectar                               | 18.0                                   | 22.0    | 14.0            | 157.1                            |
| Fruit Type Drinks - Non-Powdered           | 53.0                                   | 63.0    | 43.0            | 146.5                            |
| Lunch Meats/Cold Cuts - Packaged           | 74.0                                   | 79.0    | 69.0            | 114.5                            |
| Malt Liquor                                | 7.0                                    | 10.0    | 4.0             | 250.0                            |
| Mayonnaise                                 | 91.5                                   | 93.0    | 90.0            | 103.3                            |
| Oil - Salad/Cooking                        | 82.5                                   | 73.0    | 92.0            | 79.3                             |
| Powdered Breakfast or<br>Children's Drinks | 53.5                                   | 57.0    | 50.0            | 114.0                            |
| Rice - Natural (Short or Long Grain)       | 93.5                                   | 97.0    | 90.0            | 107.8                            |
| Salad Dressing - Prepared                  | 72.0                                   | 59.0    | 85.0            | 69.4                             |
| Sandwich Bags - Plastic                    | 63.0                                   | 61.0    | 65.0            | 93.8                             |
| Snacks - Chips, Pretzels, etc.             | 82.0                                   | 85.0    | 79.0            | 107.6                            |
| Soft Drinks - Diet                         | 37.5                                   | 30.0    | 45.0            | 66.7                             |
| Soft Drinks - Regular                      | 73.5                                   | 80.0    | 67.0            | 119.4                            |
| Tomato Paste - Canned                      | 50.0                                   | 37.0    | 63.0            | 58.7                             |
| Tomato Sauce - Canned                      | 91.0                                   | 91.0    | 91.0            | 100.0                            |
| Vegetables - Canned                        | 81.5                                   | 78.0    | 85.0            | 91.8                             |
| Vegetables - Frozen                        | 63.0                                   | 44.0    | 82.0            | 53.7                             |

Source: Strategy Research Corporation



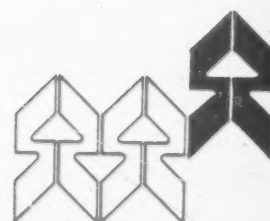
With regard to health and beauty aids, the use of hair coloring and indigestion and upset stomach remedies is more prevalent in Hispanic households, with Indices of 164.0 and 132.8, respectively. Remedies for colds, allergies, or breathing problems show a somewhat higher Hispanic use with an Index of 128.6; while hairspray has a lower Hispanic use (Index of 63.4).

TABLE VA-3b

**HISPANIC HEALTH AND BEAUTY AIDS  
CONSUMPTION—SAN ANTONIO**

| Product                                                | Percent of Households<br>Using Product |         |                 | Use<br>Index                     |
|--------------------------------------------------------|----------------------------------------|---------|-----------------|----------------------------------|
|                                                        | Total<br>Market                        | Spanish | Non-<br>Spanish | Spanish<br>To<br>Non-<br>Spanish |
| Deodorants                                             | 94.0                                   | 91.0    | 97.0            | 93.8                             |
| Facial/Eye Make-up                                     | 66.0                                   | 63.0    | 69.0            | 91.3                             |
| Hair Coloring                                          | 33.0                                   | 41.0    | 25.0            | 164.0                            |
| Hair Conditioner                                       | 57.5                                   | 58.0    | 57.0            | 101.8                            |
| Hairspray                                              | 58.0                                   | 45.0    | 71.0            | 63.4                             |
| Hand Lotion                                            | 85.0                                   | 83.0    | 87.0            | 95.4                             |
| Headache Remedies                                      | 89.0                                   | 91.0    | 87.0            | 104.6                            |
| Indigestion and Upset Stomach Remedies                 | 74.5                                   | 85.0    | 64.0            | 132.8                            |
| Mouthwash                                              | 82.5                                   | 86.0    | 79.0            | 108.9                            |
| Panty hose                                             | 72.5                                   | 66.0    | 79.0            | 83.5                             |
| Remedies for Colds, Allergies or<br>Breathing Problems | 72.0                                   | 81.0    | 63.0            | 128.6                            |
| Shampoo                                                | 96.0                                   | 97.0    | 95.0            | 102.1                            |
| Toothpaste                                             | 96.5                                   | 98.0    | 95.0            | 103.2                            |

Source: Strategy Research Corporation



San Antonio shows a higher Hispanic usage of pine oil disinfectants. Floor wax/cleaners also show higher usage among Hispanic households, with an Index of 152.6. Other dominating items in terms of use by Hispanic households include insecticides, razor blades and after shave lotion.

**TABLE VA-3c**  
**HISPANIC CLEANERS AND PAPER GOODS**  
**CONSUMPTION—SAN ANTONIO**

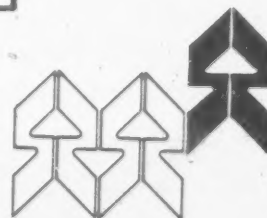
| Product                   | Percent of Households<br>Using Product |         |                 | Use<br>Index                     |
|---------------------------|----------------------------------------|---------|-----------------|----------------------------------|
|                           | Total<br>Market                        | Spanish | Non-<br>Spanish | Spanish<br>To<br>Non-<br>Spanish |
| Dishwashing Liquid        | 96.0                                   | 94.0    | 98.0            | 95.9                             |
| Floor Wax/Cleaners        | 48.0                                   | 58.0    | 38.0            | 152.6                            |
| Insecticides              | 80.0                                   | 85.0    | 75.0            | 113.3                            |
| Laundry Detergents        | 100.0                                  | 100.0   | 100.0           | 100.0                            |
| Liquid Household Cleaners | 82.0                                   | 73.0    | 91.0            | 80.2                             |
| Oven Cleaners             | 57.5                                   | 59.0    | 56.0            | 105.4                            |
| Paper Towels              | 94.0                                   | 91.0    | 97.0            | 93.8                             |
| Pine Oil Disinfectants    | 73.0                                   | 92.0    | 54.0            | 170.4                            |
| Room Deodorizers          | 79.5                                   | 80.0    | 79.0            | 101.3                            |
| Scouring Powder           | 93.5                                   | 90.0    | 97.0            | 92.8                             |

Source: Strategy Research Corporation

**TABLE VA-3d**  
**HISPANIC MISCELLANEOUS**  
**CONSUMPTION—SAN ANTONIO**

| Product            | Percent of Households<br>Using Products |         |                 | Use<br>Index                     |
|--------------------|-----------------------------------------|---------|-----------------|----------------------------------|
|                    | Total<br>Market                         | Spanish | Non-<br>Spanish | Spanish<br>To<br>Non-<br>Spanish |
| Razor Blades       | 73.5                                    | 79.0    | 68.0            | 116.2                            |
| After Shave Lotion | 68.0                                    | 73.0    | 63.0            | 115.9                            |
| Shaving Cream      | 62.5                                    | 59.0    | 66.0            | 89.4                             |

Source: Strategy Research Corporation





#### 4. Miami

Not surprisingly, Latin-type ground coffee is popular among Hispanics. In Miami, this product category registers an astronomical, 1,431.0 Index, while American-type ground coffee indexes at 41.5.

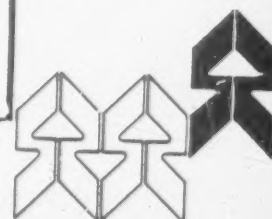
In Miami, Malta is another extremely popular beverage in Hispanic households. Here, the Hispanic to non-Hispanic Use Index is 10,675.0!

Olive oil also register high among Hispanics with a Use Index of 227.5. Regular rice (short and long grain) wins out easily over instant rice in Hispanic communities, and regular soft drink beverages are preferred over the diet type.

TABLE VA-4a  
HISPANIC FOOD & BEVERAGE  
CONSUMPTION—MIAMI

| Product                         | Percent of Households<br>Using Product |         |                 | Use<br>Index                     |
|---------------------------------|----------------------------------------|---------|-----------------|----------------------------------|
|                                 | Total                                  | Spanish | Non-<br>Spanish | Spanish<br>To<br>Non-<br>Spanish |
| Baby Food - Dry                 | 8.1%                                   | 10.7%   | 6.8%            | 157.4%                           |
| Baby Food - Jar                 | 8.9                                    | 14.4    | 6.2             | 232.3                            |
| Beer                            | 60.5                                   | 66.4    | 57.5            | 115.5                            |
| Bread - Sliced White            | 90.7                                   | 93.7    | 89.2            | 105.0                            |
| Cheese - Sliced Processed       | 85.4                                   | 84.0    | 86.1            | 97.6                             |
| Chewing Gum                     | 47.0                                   | 47.0    | 47.0            | 100.0                            |
| Coffee - American Type - Ground | 52.1                                   | 27.0    | 65.0            | 41.5                             |
| Coffee - Latin Type - Ground    | 31.9                                   | 83.0    | 5.8             | 1,431.0                          |
| Frozen Dinners                  | 23.4                                   | 18.7    | 25.9            | 72.2                             |
| Fruit - Canned                  | 75.8                                   | 69.7    | 79.0            | 88.2                             |
| Fruit Nectar                    | 33.9                                   | 61.0    | 20.1            | 303.5                            |
| Fruit Type Drinks               | 46.2                                   | 37.4    | 50.7            | 73.8                             |
| Gelatine/Pudding Powdered       | 75.7                                   | 79.4    | 73.9            | 107.4                            |
| Gelatine/Pudding Ready To Eat   | 18.2                                   | 26.0    | 14.3            | 181.2                            |
| Juice - Frozen Fruit            | 57.7                                   | 41.4    | 66.0            | 62.7                             |
| Juice - Tomato                  | 58.8                                   | 58.0    | 59.2            | 98.0                             |
| Juice - Mixed Vegetable         | 41.4                                   | 40.0    | 42.2            | 94.8                             |
| Lunch Meat - Canned             | 17.9                                   | 15.0    | 19.4            | 77.3                             |
| Lunch Meat - Packaged           | 49.2                                   | 33.0    | 57.5            | 57.4                             |
| Malt Liquor                     | 4.3                                    | 6.0     | 3.4             | 176.5                            |
| Malta                           | 14.6                                   | 42.7    | 0.4             | 10,675.0                         |
| Margarine                       | 90.3                                   | 85.4    | 92.9            | 91.9                             |
| Mayonnaise                      | 86.0                                   | 85.4    | 86.4            | 98.8                             |
| Oil - Olive                     | 52.6                                   | 83.7    | 36.8            | 227.5                            |

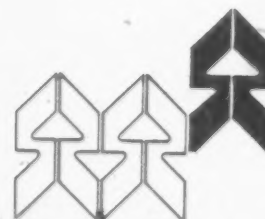
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| Product                               | Percent of Households<br>Using Product |         |             | Use<br>Index                 |
|---------------------------------------|----------------------------------------|---------|-------------|------------------------------|
|                                       | Total                                  | Spanish | Non-Spanish | Spanish<br>To<br>Non-Spanish |
| Oil - Salad/Cooking                   | 86.3                                   | 86.0    | 86.4        | 99.5                         |
| Pet Food - Cat                        | 12.8                                   | 4.0     | 17.4        | 23.0                         |
| Pet Food - Dog                        | 39.9                                   | 34.0    | 42.9        | 79.3                         |
| Potato/Corn Chips                     | 64.5                                   | 65.0    | 64.3        | 101.1                        |
| Powdered Breakfast Drinks             | 14.8                                   | 13.7    | 15.4        | 89.0                         |
| Powdered Children's Afternoon Drinks  | 25.9                                   | 22.7    | 27.6        | 82.3                         |
| Rice - Instant                        | 34.6                                   | 6.4     | 49.0        | 13.1                         |
| Rice - Regular (Short and Long Grain) | 83.9                                   | 96.4    | 77.6        | 124.2                        |
| Salad Dressing - Dry Mix              | 17.6                                   | 6.0     | 23.5        | 25.5                         |
| Salad Dressing - Prepared             | 56.3                                   | 38.7    | 65.4        | 59.2                         |
| Shortening                            | 51.0                                   | 22.4    | 65.7        | 34.1                         |
| Soft Drinks - Diet                    | 31.2                                   | 15.0    | 39.5        | 38.0                         |
| Soft Drinks - Regular                 | 78.8                                   | 90.0    | 73.2        | 123.0                        |
| Spaghetti - Canned                    | 29.7                                   | 34.0    | 27.6        | 123.2                        |
| Spaghetti - Dry                       | 78.3                                   | 71.7    | 81.7        | 87.8                         |
| Spaghetti - Sauce                     | 40.7                                   | 36.4    | 42.9        | 84.9                         |
| Tea                                   | 78.3                                   | 64.4    | 85.4        | 75.4                         |
| Tomato Paste - Canned                 | 56.6                                   | 39.7    | 65.4        | 60.7                         |
| Tomato Sauce - Canned                 | 79.8                                   | 87.0    | 76.2        | 114.2                        |
| Tuna - Canned                         | 82.7                                   | 74.0    | 87.1        | 85.0                         |
| Vegetables - Canned                   | 72.2                                   | 62.4    | 77.3        | 80.7                         |
| Vegetables - Frozen                   | 68.4                                   | 45.0    | 80.3        | 56.0                         |
| Yogurt                                | 33.5                                   | 33.7    | 33.4        | 100.9                        |

Source: Strategy Research Corporation



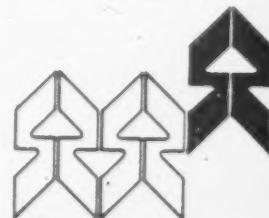
In Miami, the Use Index of hair coloring and eye make-up (165.5 and 137.0, respectively), is strong. Compared to New York, Los Angeles and San Antonio, relative use of indigestion and stomach remedies is low among Miami Hispanics (in relation to non-Hispanic use).

TABLE VA-4b

**HISPANIC HEALTH & BEAUTY AID  
CONSUMPTION—MIAMI**

| Product                                | Percent of Households<br>Using Product |         |             | Use<br>Index                 |
|----------------------------------------|----------------------------------------|---------|-------------|------------------------------|
|                                        | Total                                  | Spanish | Non-Spanish | Spanish<br>To<br>Non-Spanish |
| Arthritis Remedies                     | 18.1%                                  | 19.7%   | 17.4%       | 113.2%                       |
| Cold Remedies (Tablets and Capsules)   | 36.2                                   | 25.0    | 41.9        | 59.7                         |
| Liquid Cold Remedies                   | 30.0                                   | 29.4    | 30.3        | 97.0                         |
| Cough Syrup                            | 40.2                                   | 37.0    | 41.9        | 88.3                         |
| Deodorants                             | 90.5                                   | 99.4    | 86.1        | 115.5                        |
| Disposable Diapers                     | 10.7                                   | 10.0    | 10.9        | 91.7                         |
| Eye Make-up                            | 55.5                                   | 67.7    | 49.4        | 137.0                        |
| Hair Coloring                          | 35.4                                   | 48.0    | 29.0        | 165.5                        |
| Cream Hair Rinse                       | 48.1                                   | 58.4    | 42.9        | 136.1                        |
| Hair Spray                             | 55.9                                   | 64.7    | 51.4        | 125.9                        |
| Hand Lotion                            | 68.9                                   | 74.7    | 66.0        | 113.2                        |
| Headache Remedies                      | 87.5                                   | 89.7    | 86.4        | 103.8                        |
| Indigestion and Upset Stomach Remedies | 67.2                                   | 62.4    | 69.8        | 89.4                         |
| Laxatives                              | 26.9                                   | 29.0    | 25.9        | 112.0                        |
| Lipstick                               | 81.0                                   | 89.0    | 76.9        | 115.7                        |
| Mouthwash                              | 76.9                                   | 77.7    | 76.6        | 101.4                        |
| Ointments and Rubs                     | 51.6                                   | 45.4    | 54.8        | 82.9                         |
| Pantyhose                              | 64.9                                   | 81.4    | 56.5        | 144.1                        |
| Shampoo                                | 92.6                                   | 96.0    | 90.9        | 105.6                        |
| Sunburn Products                       | 28.3                                   | 20.4    | 32.4        | 63.0                         |
| Suntan Lotion                          | 32.2                                   | 32.7    | 32.0        | 102.2                        |
| Toothpaste                             | 95.4                                   | 99.7    | 93.2        | 107.0                        |
| Vitamins                               | 50.2                                   | 43.4    | 53.8        | 80.7                         |

Source: Strategy Research Corporation



Pine oil disinfectants rank high among Hispanics in Miami, with a Use Index of 136.5; while dishwasher detergents have a low Use Index of 50.4. Oven cleaners show a high Use Index (116.2) among Miami Hispanic homes.

**TABLE VA-4c**  
**HISPANIC CLEANERS AND PAPER GOODS**  
**CONSUMPTION—MIAMI**

| Product                     | Percent of Households<br>Using Product |         |                 | Use<br>Index                     |
|-----------------------------|----------------------------------------|---------|-----------------|----------------------------------|
|                             | Total                                  | Spanish | Non-<br>Spanish | Spanish<br>To<br>Non-<br>Spanish |
| Bar Soap                    | 99.4%                                  | 99.7%   | 99.4%           | 100.3%                           |
| Bleach                      | 94.3                                   | 93.7    | 94.6            | 99.1                             |
| Dishwasher Detergent        | 33.7                                   | 20.4    | 40.5            | 50.4                             |
| Drain Openers               | 57.8                                   | 50.4    | 61.6            | 81.8                             |
| Facial Tissue               | 88.2                                   | 84.4    | 90.2            | 93.6                             |
| Hand Detergent              | 97.2                                   | 98.4    | 96.6            | 101.9                            |
| Insecticides                | 73.9                                   | 61.4    | 80.3            | 76.5                             |
| Laundry Detergent           | 99.0                                   | 97.7    | 99.7            | 98.0                             |
| Liquid Household Cleaners   | 85.9                                   | 81.7    | 88.1            | 92.7                             |
| Oven Cleaners               | 63.9                                   | 70.4    | 60.6            | 116.2                            |
| Paper Towels                | 96.4                                   | 96.7    | 96.3            | 100.4                            |
| Pine Oil Disinfectants      | 73.0                                   | 88.7    | 65.0            | 136.5                            |
| Powdered Household Cleaners | 96.9                                   | 94.7    | 98.0            | 96.6                             |

Source: Strategy Research Corporation

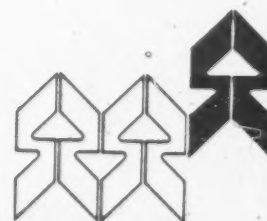
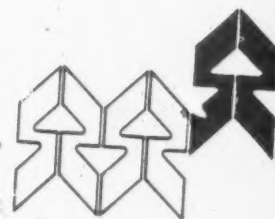


TABLE VA-44

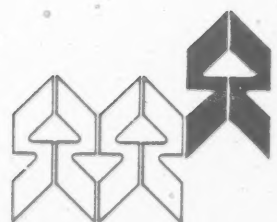
# HISPANIC MISCELLANEOUS CONSUMPTION—MIAMI

| Product                      | Percent of Households<br>Using Product |         |                 | Use<br>Index                     |
|------------------------------|----------------------------------------|---------|-----------------|----------------------------------|
|                              | Total                                  | Spanish | Non-<br>Spanish | Spanish<br>To<br>Non-<br>Spanish |
| After Shave Lotion           | 55.6%                                  | 61.4%   | 52.8%           | 116.3%                           |
| Automobile Insurance         | 84.6                                   | 87.0    | 83.4            | 104.3                            |
| Automobile Tires (12 Months) | 44.3                                   | 47.2    | 42.9            | 110.0                            |
| Car Battery (12 Months)      | 32.2                                   | 34.7    | 31.0            | 111.9                            |
| Flashlight Batteries         | 70.6                                   | 67.0    | 72.5            | 92.4                             |
| Home Extermination Service   | 39.3                                   | 39.0    | 39.5            | 98.7                             |
| Razor Blades                 | 66.4                                   | 76.0    | 61.6            | 123.4                            |
| Rent-A-Car                   | 9.8                                    | 5.0     | 12.3            | 40.7                             |
| Shaving Cream                | 57.2                                   | 59.4    | 56.2            | 105.7                            |
| Television Set               | 98.3                                   | 97.7    | 98.7            | 99.0                             |
| Transistor Batteries         | 56.1                                   | 60.7    | 53.8            | 112.8                            |
| Watches                      | 45.0                                   | 52.6    | 41.2            | 127.7                            |

Source: Strategy Research Corporation



## **VI. BROADCAST MEDIA**



## VI. Broadcast Media

The growing recognition gained by the Spanish language format station as a profitable and effective advertising medium is evidence of the on-going trend in broadcasting towards specialized programming designed to attract a specific segment of the overall audience. Radio long ago became a specialized medium, each format concentrating on appealing to a particular type of listener. Radio formats such as "Top Forty", "All News", "Country & Western", "Album Rock" and "Spanish", have all made a place for themselves in the market according to the type of audience they draw.

An ever increasing number of Spanish language radio stations is successfully providing programming and attracting significant audiences among the 15 million Spanish speaking people in the United States. In every U.S. Hispanic market, Spanish language radio is a major factor. The Los Angeles area has 6 full-time Spanish radio stations, New York has 3, San Antonio has 3, Phoenix has 3, San Diego has 5, Miami has 5, San Francisco/San Jose has 4 and the list continues to grow. In the U.S. mainland, there are over 80 full time Spanish format radio stations. An additional 35 to 40 stations program 3 to 8 hours a day in the Spanish language.

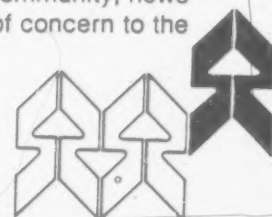
There are currently thirteen Spanish language television stations operating within the United States. Of the thirteen, ten are affiliates of SIN-National Spanish Television Network. An independent, KEMO-TV in San Francisco, broadcasts a few hours a week of foreign language programming other than Spanish. KBSC-TV in Los Angeles broadcasts in Spanish from 8:30 a.m. to 7:00 p.m. when it switches to subscription television. The television stations are all located in markets with high Hispanic concentration; seven of the thirteen stations are located in the top five Hispanic ADI's according to population.

In descending market order, Spanish language television stations operate in New York, WNJU-TV and WXTV; Los Angeles KBSC-TV and KMEX-TV; San Antonio, KWEX-TV; Miami, WLTW; San Francisco, KDTV and KEMO-TV; KFTV; Corpus Christi, KORO-TV; Sacramento-Stockton, KLOC-TV. Additionally, SIN's signal is carried by over 60 cable systems and translators (low-power repeater stations). The number of markets reached in one form or another by Spanish language television programming is expected to continue growing.

The Hispanic Print media has not experienced the same rapid growth rate as the electronic media. Nevertheless, some of the major Hispanic centers of population are served by Spanish language daily newspapers; many have Spanish language weeklies. With few exceptions, Spanish language magazines distributed in the U.S. are printed outside of the country. The editorial content of most Spanish magazines covers topics, personalities and events of greatest impact outside the United States. Those with the largest circulations in the U.S. target their editorial content at the Hispanic woman.

As a target audience, Hispanics are particularly well-defined and accessible. Hispanic broadcast programming, especially music and other entertainment programming, is essentially characterized by the adherence to traditional Hispanic cultural values and by the use of the Spanish language. Accessibility to the Hispanic audience is facilitated by the fact that U.S. Hispanics are geographically concentrated and largely urban; they can therefore be effectively reached through the use of relatively few media outlets.

Spanish stations serve as the primary source of news, information and entertainment for many of the Spanish speaking people in their coverage area. Generally, Spanish stations are active and effective advocates for the Hispanic community they serve, taking strong editorial positions and providing special programming on issues that affect their audience. In order of priority, news coverage on Spanish stations usually concentrates on events taking place in the local Hispanic community, news from the country of origin of the local Hispanic audience, local and national events of concern to the Hispanic community and news from the rest of the Hispanic world.





In entertainment programming, the emphasis is on Hispanic music and artists, characters and situations that are culturally attuned to the Hispanic. The majority of the Spanish entertainment programming is imported from the countries of origin of the U.S. Hispanic population; it is not old American programming dubbed into Spanish. Of the Hispanic countries exporting entertainment programming to the U.S., Mexico currently provides the bulk nationally, be it a television program or the music on the play list of a Spanish format radio station. The United States is producing an increasing amount of the Spanish language programming listened to and viewed by Hispanics in this country.

Spanish broadcasting relies on entertainment programming and on news from the country of origin to offer a media environment which presents a view of the world as perceived by Hispanics. Spanish broadcasting offers programming that is credible, relevant and emotionally tuned to Hispanics. This combination of informational and emotional ties to Hispanic cultural values and to country of origin creates an appeal that is stronger than the sum of its parts, particularly as reinforced by their presence within a Spanish language framework.

Concurrent with its role as a direct electrical connection to the Spanish language, Hispanic culture and country of origin, the Spanish station also serves as the individual voice of a unique local Hispanic community. The nature of the Spanish station's newscasts, editorials, public service and special programming reflects the station's abiding interest in its audience. Deep involvement in the community they serve is characteristic of Spanish stations, particularly among those that are most successful in drawing sizable audiences.

The various appeals which Spanish broadcasting offers the Hispanic result in a high degree of audience loyalty to Spanish stations. Additionally, the Hispanic usually identifies very strongly with a particular Spanish station. It is not rare for the Hispanic to have the radio or television set unwaveringly tuned to his or her favorite Spanish station throughout the day and night.

The strong identification of the Hispanic audience with Spanish format stations contributes greatly to the effectiveness of the advertising which the station carries. The comfortable programming environment provided by the station, the built-in credibility which it enjoys, the emotional ties to language and culture, they are all extended by association to the station's advertisements. The Hispanic also appreciates the fact that the product advertising in Spanish on his station has made a special effort to present the product to him.

Essentially, Spanish broadcasting offers a credible medium delivering maximum coverage of a loyal and well-defined audience. For the advertiser willing to make even a limited investment, Spanish broadcasting will elicit a strong Hispanic consumer response from an audience appreciative of the advertiser's effort.

## Spanish Format Station Listing Radio

### ARIZONA

#### Phoenix

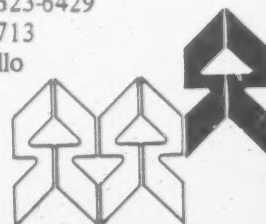
KIFN (AM) 860 KHz (602) 257-9363  
147 E. Garfield, Phoenix 85001  
General Manager: Mauricio Mendez

KPHX (AM) 1480 KHz (602) 257-1351  
1975 South Central Avenue, Phoenix 85004  
General Manager: Rose Beck

#### Tucson

KEVT (AM) 690 KHz (602) 624-5588  
Box 101, Tucson 85702  
General Manager: Joe Crystall

KXEW (AM) 1600 KHz (602) 623-6429  
889 W. El Puente Lane, Tucson 85713  
General Manager: Ernesto V. Portillo



## CALIFORNIA

### Bakersfield

KWAC (AM) 1490 KHz (805) 327-9711  
5200 Standard Street, Bakersfield 93308  
General Manager: Carlos Montano

### Burbank

KROQ (AM) 1500 KHz (213) 520-1500  
6290 Sunset Blvd, Hollywood 90028  
General Manager: Jose Molina

### Burlingame

KOFY (AM) 1050 KHz (415) 692-2433  
1818 Gilbreth Rd, Burlingame 94010  
General Manager: Ed Rivera

### Coachella

KVIM (FM) 93.7 MHz (714) 347-2333  
Drawer 401, Indio 92201  
General Manager: Gilberto Esquivel

### Fresno

KGST (AM) 1600 MHz (209) 266-9901  
P.O. Box 11868, Fresno 93775  
General Manager: Ben Gutierrez

KXEX (AM) 1550 KHz (209) 233-8803  
P.O. Box 12223, Fresno 93777  
General Manager: John Sonder

### Gilroy

KAZA (AM) 1290 KHz (408) 998-1290  
Box 1290, San Jose 95108  
General Manager: Ted Carlsen

### Hollister

KMPG (AM) 1520 KHz (408) 637-7476  
Box 1414, Hollister 95023  
General Manager: Gilberto de Leon

### Lodi

KCVR (AM) 1570 KHz (209) 368-0626  
P.O. Box 600, Lodi 95240  
General Manager: George Sampson

### Los Angeles

KLVE (FM) 107.5 MHz (213) 465-3171  
5724 Hollywood Blvd, Los Angeles 90028  
General Manager: Julio Lieberman

KTNQ (AM) 1020 KHz (213) 465-3171  
5724 Hollywood Blvd, Los Angeles 90028  
General Manager: Julio Lieberman

### McFarland

KXEM (AM) 1590 KHz (805) 792-2128  
P.O. Box 326, McFarland 93250  
General Manager: Joe Hochschild

### Ontario

KNSE (AM) 1510 KHz (714) 981-8893  
P.O. Box 5000, Ontario 91761  
General Manager: Jack L. Siegal

### Oxnard

KOXR (AM) 910 KHz (805) 487-0444  
418 W. Third Street, Oxnard 93030  
General Manager: Norman L. Posen

### Pasadena

KWKW (AM) 1300 KHz (213) 466-8111  
6777 Hollywood Blvd, Hollywood 90028  
General Manager: Joe Cabrera

### Redlands

KCAL (AM) 1410 KHz (714) 825-5020  
Box 390, Redlands 92373  
General Manager: Andy James

### Roseville

KPIP (FM) 93.5 MHz (916) 791-4111  
P.O. Box 1110, Roseville 95678  
General Manager: Gene Ragle

### **Salinas**

KCTY (AM) 980 KHz (408) 449-2421  
P.O. Box 1939, Salinas 93902  
General Manager: Martin L. Kline, Jr.

KRAY (FM) 103.9 MHz (418) 449-2421  
P.O. Box 1939, Salinas 93902  
General Manager: Martin L. Kline, Jr.

### **San Francisco**

KBRG (FM) 105.3 MHz (415) 626-1053  
1355 Market Street, San Francisco 94103  
General Manager: Doug Matthews

### **San Jose**

KNTA (AM) 1430 KHz (408) 244-1430  
P.O. Box 6528, San Jose 95150  
General Manager: Gene Hogan

### **Santa Maria**

KZON (AM) 1600 KHz (805) 922-7323  
605 W. Main, Santa Maria 93454  
General Manager: Artist Robinson

### **Santa Rosa**

KBBF (FM) 89.1 MHz (707) 545-8833  
P.O. Box 7189, Santa Rosa 95401  
General Manager: Josue Lopez

### **Stockton**

KSTN (FM) 107.3 MHz (209) 948-5786  
2171 Ralph Avenue, Stockton 95206  
General Manager: Knox LaRue

## **COLORADO**

### **Denver**

KBNO (AM) 1220 KHz (303) 922-1151  
1601 West Jewell Ave, Denver 80223  
General Manager: Jack Tipton

### **Pueblo**

KAPI (AM) 690 KHz (303) 545-2883  
2829 Lowell Blvd, Pueblo 81003  
General Manager: Andrew Neidig

## **CONNECTICUT**

### **Hartford**

WLVI (FM) 93.7 MHz (203) 549-1175  
18 Asylum St., Hartford 06103  
General Manager: Jose Grimalt

### **New Britain**

WRYM (AM) 840 KHz (203) 666-5646  
1056 Willard Ave, Newington 06111  
General Manager: Barry A. Kursman

## **FLORIDA**

### **Miami**

WCMQ (AM) 1220 KHz (305) 854-1830  
1411 Coral Way, Miami 33145  
General Manager: Jack Hogan

WCMQ (FM) 92.1 MHz (305) 854-1830  
1411 Coral Way, Miami 33145  
General Manager: Jack Hogan

WOCN (AM) 1450 KHz (305) 371-1450  
P.O. Box 1450, Miami 33145  
General Manager: Carlos B. Fernandez

WQBA (AM) 1140 KHz (305) 643-5000  
701 SW 27th Avenue, Miami 33135  
General Manager: Herbert M. Levin

WQBA (FM) 107.5 MHz (305) 643-5000  
701 SW 27th Avenue, Miami 33135  
General Manager: Herbert M. Levin

WRHC (AM) 1550 KHz (305) 541-3300  
2260 SW 8th Street, Miami 33135  
General Manager: Salvador Lew

### **Tampa**

WSOL (AM) 1300 KHz (813) 253-0135  
1711 W. Kennedy Blvd, Tampa 33606  
General Manager: Monroe E. Berkman

WYOU (AM) 1550 KHz (813) 253-6071  
P.O. Box 1988, Tampa 33601  
General Manager: Art Reuben

### **Winter Park**

WMJK (AM) 1220 KHz (305) 628-4258  
445 N. Wymore Rd, Suite 200, Winter Park 32789  
General Manager: Bebo Kramer

## **ILLINOIS**

### **Chicago**

WCRW (AM) 1240 KHz (312) 327-6860  
2756 Pine Grove Avenue, Chicago 60614  
General Manager: Edward Jacker

WEDC (AM) 1240 KHz (312) 631-0700  
5475 N. Milwaukee Ave, Chicago 60630  
General Manager: A.B. Pucinski

WSBC (AM) 1240 KHz (312) 777-1700  
4949 W. Belmont Ave, Chicago 60641  
General Manager: Daniel R. Lee

### **Evanston**

WOJO (FM) 105 MHz (312) 869-8900  
2425 Main Street, Evanston 60202  
General Manager: Athena Sofios

### **Oak Park**

WOPA (AM) 1490 KHz (312) 378-4653  
408 S. Oak Park Avenue, Oak Park 60302  
General Manager: Sidney Schneider

## **LOUISIANA**

### **Gretna**

KGLA (AM) 1540 KHz (504) 347-8491  
Box 428, Marrero 70072  
General Manager: Alberto Carillo

## **MASSACHUSETTS**

### **Boston**

WUNR (AM) 1600 KHz (617) 357-8677  
275 Tremont Street, Boston 02116  
General Manager: Allan Johnson

## **NEW JERSEY**

### **Carlstadt**

WBNX (AM) 1380 KHz (212) 594-1380  
Box 1380, Carlstadt 07072  
General Manager: Georgina Garcia

### **South Vineland**

WREY (AM) 1440 KHz (609) 327-4141  
P.O. Box 1440, South Vineland 08360  
General Manager: Amy Lugo Gonzales

### **Vineland**

WDVL (AM) 1270 KHz (609) 696-2070  
Box 457, Vineland 08360  
General Manager: Vita Marie Ventresca

## **NEW MEXICO**

### **Albuquerque**

KABQ (AM) 1350 KHz (505) 243-1744  
Box 4486, Albuquerque  
General Manager: Ed Gomez

KDAZ (AM) 730 KHz (505) 884-7373  
Box 4338, Albuquerque 87106  
General Manager: Belarmino R. Gonzales

### **Espanola**

KDCE (AM) 970 KHz (505) 753-2201  
P.O. Box 970, Espanola 87533  
General Manager: James F. Hoffman



## NEW YORK

### New York

WADO (AM) 1280 KHz (212) 599-2701  
666 Third Avenue, New York 10017  
General Manager: Nelson G. Lavergne

WJIT (AM) 1480 KHz (212) 935-5170  
655 Madison Avenue, New York 10021  
General Manager: Leonard Mirelson

## TEXAS

### Austin

KMXX (FM) 102.3 MHz (512) 478-5699  
121 East 8th Street, Austin 78758  
General Manager: Roberto Villanueva

### Beeville

KCWW (FM) 104.9 MHz (512) 358-1490  
Box 700, Beeville 78102  
General Manager: Ed Loveland

### Carrizo Springs

KBEN (AM) 1450 KHz (512) 876-2210  
203 S. 4th Street, Carrizo Springs 78834  
General Manager: Walter H. Herbort, Jr.

### Corpus Christi

KCCT (AM) 1150 KHz (512) 884-2426  
701 Benys, Corpus Christi 78405  
General Manager: Manuel Davila, Jr.

KUNO (AM) 1400 KHz (512) 884-5202  
Drawer 4722, Corpus Christi 78408  
General Manager: Jack Robards

### Eagle Pass

KEPS (AM) 1270 KHz (512) 773-9247  
P.O. Box 1123, Eagle Pass 78852  
General Manager: Doug Stalker

### El Paso

KAMA (AM) 1060 KHz (915) 544-7600  
4150 Pinnacle Street, El Paso 79902  
General Manager: Jack R. McVeigh

### Fort Worth

KESS (FM) 93.9 MHz (817) 429-1037  
Box 6195, Fort Worth 76115  
General Manager: Marcos Rodriguez

KTIA (AM) 1540 KHz (817) 336-1540  
616 One Tandy Center, Ft. Worth 76102  
General Manager: Johnny Gonzalez

### Harlingen

KGBT (AM) 1530 KHz (512) 423-3910  
P.O. Box 711, Harlingen 78550  
General Manager: Carlos A. Cantu

KIWW (FM) 96.1 MHz (512) 423-3211  
302 West Adams, Harlingen 78550  
General Manager: Pedro Diaz, Jr.

### Houston

KEHY (AM) 950 KHz (713) 527-9363  
3130 Southwest Freeway, Houston 77098  
General Manager: Donald Wigginton

### Lubbock

KLFB (AM) 1420 KHz (806) 765-8114  
P.O. Box 5697, Lubbock 79417  
General Manager: Marcelo Tafuya

### McAllen

KQXX (FM) 98.5 MHz (512) 687-2702  
608 S. Main Street, McAllen  
General Manager: C.T. McKassen

### Mission

KIRT (AM) 1580 KHz (512) 585-1629  
1123 E. Ninth Street, Mission 78572  
General Manager: C.T. McKassen

### **Pasadena**

KLVL (AM) 1480 KHz (713) 225-3207  
111 North Ennis, Houston 77003  
General Manager: Felix H. Morales

### **Pearsall**

KVWG (AM) 1380 KHz (512) 334-2500  
Box K, Pearsall, 78061  
General Manager: Jesus Sifuentes, Jr.

### **Port Lavaca**

KGUL (AM) 1560 KHz (512) 552-2951  
105 Calhoun Plaza, Port Lavaca 77979  
General Manager: Ken Schupbach

### **Ralls**

KCLR (AM) 1530 KHz (806) 762-1314  
Box 669, Ralls 79357  
General Manager: Margaret G. Wilson

### **San Angelo**

KSJT (FM) 97.5 MHz (915) 653-5008  
Box 1878, San Angelo 76901  
General Manager: Rod Spain

### **San Antonio**

KCOR (AM) 1350 KHz (512) 225-2751  
411 East Durango, San Antonio 78204  
General Manager: Nathan Sofir

KEDA (AM) 1540 KHz (512) 226-5254  
510 South Flores St., San Antonio 78204  
General Manager: Manuel G. Davila

KFHM (AM) 1150 KHz (512) 224-1166  
106 S. Concho St., San Antonio 78207  
General Manager: Angel Toledo

KUKA (AM) 1250 KHz (512) 225-5757  
501 W. Quincy, San Antonio 78212  
General Manager: Marshall Coe

KVAR (FM) 104 MHz (512) 696-9940  
8400 Data Point Drive, San Antonio 78229  
General Manager: Everett Kunin

## **Television**

### **ARIZONA**

#### **Phoenix**

KTVW-TV (SIN) Ch. 33 (602) 243-6633  
3019 E. Southern, Phoenix 85040  
General Manager: Fernando Vender

### **CALIFORNIA**

#### **Hanford/Fresno**

KFTV (SIN) Ch. 21 (209) 268-4204  
1857 Fulton Street, Fresno 93721  
General Manager: Luis Romanacce

#### **Los Angeles**

KBSC-TV (Ind) Ch. 52 (213) 507-6522  
1139 Grand Central, Ave., Glendale 91201  
General Manager: John Mohr

KMEX-TV (SIN) Ch. 34 (213) 466-8131  
5420 Melrose Avenue, Hollywood 90038  
General Manager: Daniel Villanueva

#### **Modesto**

KLOC-TV (SIN) Ch. 19 (209) 527-3060  
2842 Iowa Avenue, Modesto 95351  
General Manager: Chester Smith

#### **San Francisco**

KDTV (SIN) Ch. 14 (415) 641-1400  
2200 Palou Avenue, San Francisco 94124  
General Manager: Emilio Nicolas, Jr.

KEMO-TV (Ind) Ch. 20 (415) 285-6420  
2500 Marin Street, San Francisco 94124  
General Manager: Rene de la Rosa



## FLORIDA

### Miami

WLTU (SIN) Ch. 23 (305) 652-4000  
2525 SW 3rd Ave., #412, Miami 33129  
General Manager: Joaquin Blaya

## ILLINOIS

### Chicago

WCIU-TV (SIN) Ch. 26 (312) 663-0260  
141 W. Jackson Boulevard, Chicago 60604  
General Manager: Howard Shapiro

## NEW YORK

### New York

WNJU-TV (Ind.) Ch. 47 (201) 643-9100  
1020 Broad Street, Newark, N.J. 07102  
General Manager: Carlos Barba

WXTV (SIN) Ch. 41 (201) 348-4141  
24 Meadowland Parkway, Secaucus, N.J. 07094  
General Manager: Ivan Egas

## TEXAS

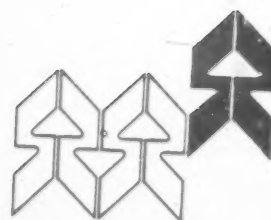
### Corpus Christi

KORO-TV (SIN) Ch. 28 (512) 883-2823  
600 Leopard Street, Corpus Christi 78473  
General Manager: Serbando Caballero

### San Antonio

KWEX-TV (SIN) Ch. 41 (512) 227-4141  
P.O. Box 9225, San Antonio 78204  
General Manager: Emilio Nicolas

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General Manager  
KROQ, Hollywood, CA

Mr. Angel Toledo  
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KFHM, San Antonio, TX

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